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MAY/JUNE 2018

THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION

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LEADERSHIP

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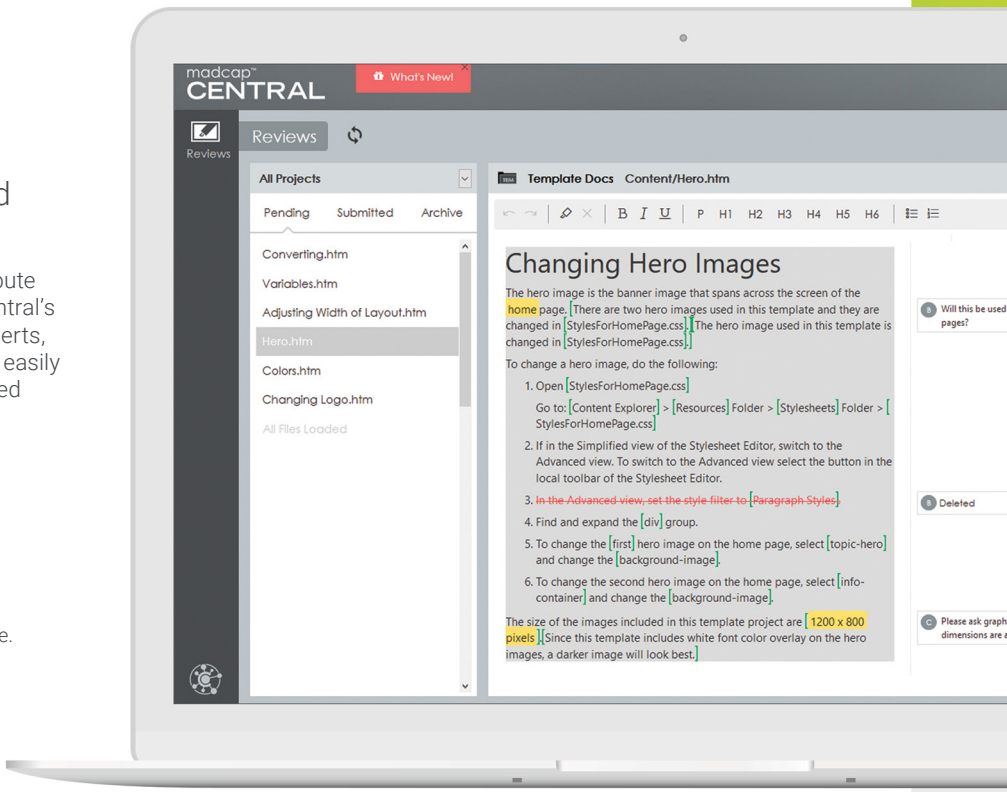
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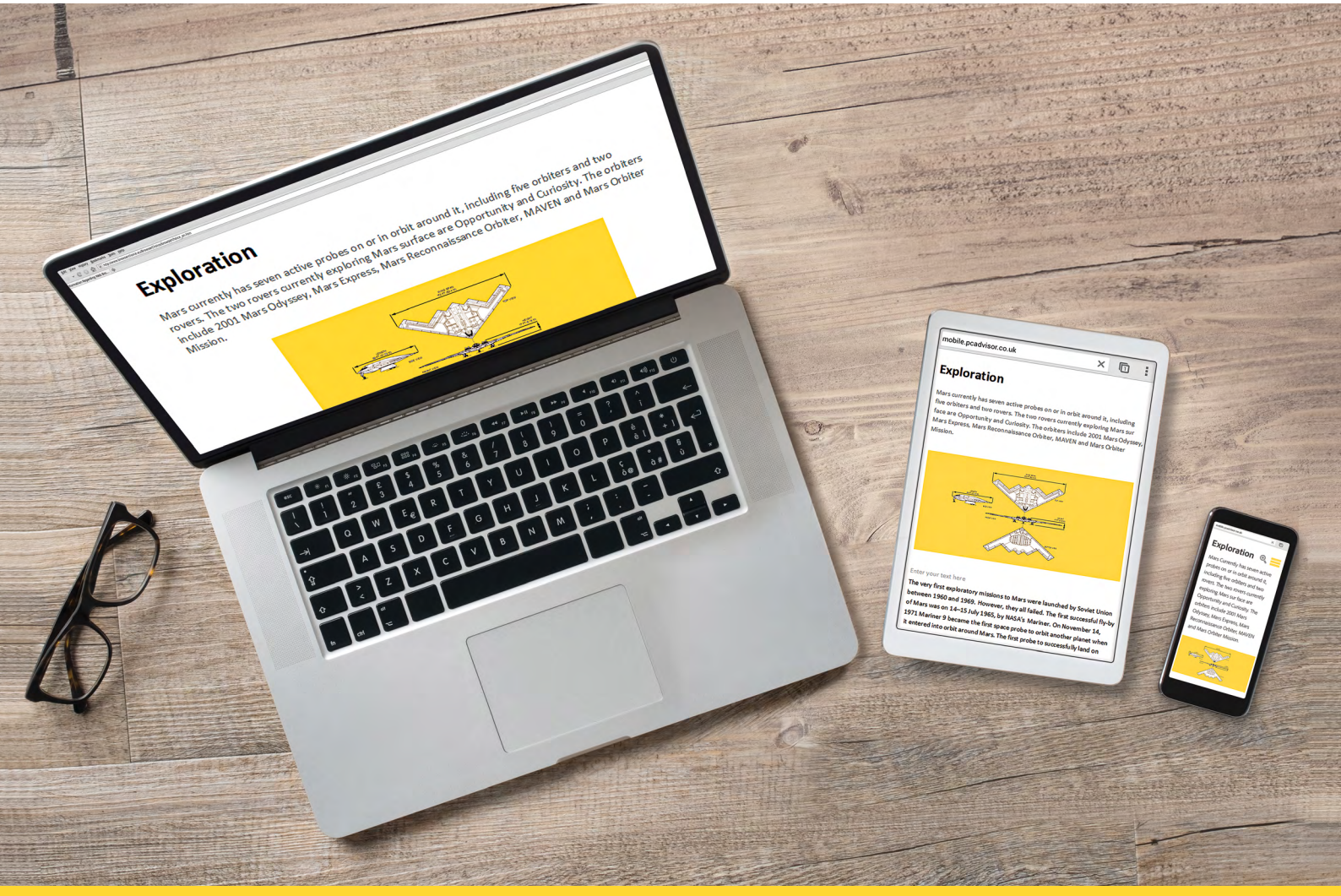
Exploration
Mars currently has seven active probes on or in orbit around it, including five orbiters and two rovers. The two rovers currently exploring Mars surface are Opportunity and Curiosity. The orbiters include 2001 Mars Odyssey, Mars Express, Mars Reconnaissance Orbiter, MAVEN and Mars Orbiter Mission.
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Exploration
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The very first exploratory missions to Mars were launched by Soviet Union between 1960 and 1969. However, they all failed. The first successful fly-by of Mars was on 14–15 July 1965, by NASA's Mariner. On November 14, 1971 Mariner 9 became the first space probe to orbit another planet when it entered into orbit around Mars. The first probe to successfully land on

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Cover image shutterstock/Lightspring

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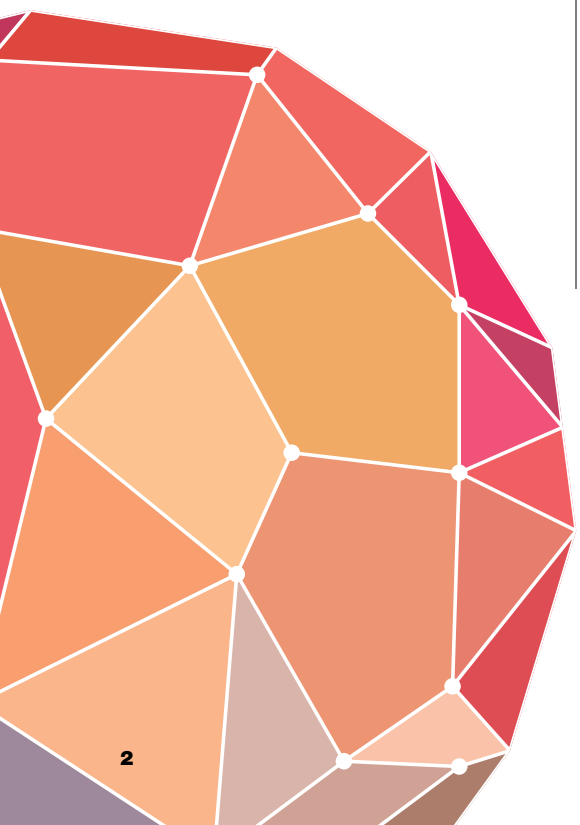

A Note from the Editor

FOR AN ISSUE LIKE THIS ONE—with a theme about which I am so passionate that I built my entire business around it—it's difficult to select a single focus for an editorial. So instead of choosing, I'm going to:

- Explore in a bit of detail the *two* behaviors that I think are most important for any leader (I also think they are the hardest, so if you can achieve these, everything else is a cake walk).
- Gift to you my desert-island, annotated, leadership resource list; it's long, so it's online at *www.stc.org/intercom*.
- Introduce you to the awesomesauce (it's in the *Urban Dictionary!*) that is the content in this issue.

Ready? Let's go!

"Oh, behave!"

(Yes, that's an Austin Powers reference. You're welcome!)

Plato is rumored to have said, "Human behavior flows from three main sources: desire, emotion, and knowledge." I concur. And much of leadership is about modulating your own behavior—often to the point of creating habits and rituals—and controlling your own mindset, or the desire and emotion part. I'm not going to get into the *woo-woo* (also in the *Urban Dictionary*) of mindset here (for that you can see my 2013 LavaCon keynote). Instead, I will focus on the knowledge (which will, in turn, likely affect your mindset; tricky, no?), as I've seen time and again that people find it much easier to feel they can control behavior from an objective, informed place. Don't misunderstand me: it is hard to change behaviors—especially those unconsciously nurtured over decades and fueled by desire and emotion—but we *feel* like we can control our behavior by studying it, so it's an easier place to start discussing and working on leadership.

"The road to *yes* is paved with a thousand *no*s."

(Demir Bentley, Head Coach, and Carey Bentley, CEO, Lifehack Bootcamp—and my beloved productivity coaches)

The first and most important leadership behavior to adopt is *prioritizing*. Here is the hard pill for technical communicators to swallow: prioritizing means *there's stuff you're* not *going to do*. I know, right? Tough stuff.

Every team I've ever worked with has *prided* itself on its ability to suck it up, take on whatever was thrown at them, and work until they dropped to meet every deadline, no matter how insane. "Doc will never be a stop-ship issue," is a common refrain—even when the scope for technical content has blown out of control, and dates have not correspondingly changed.

I'm just going to come right out and say it: *this is ridiculous, people!* Yeah, we're awesome and all, but this approach is *not awesome,* and it does not prove that we're awesome. As an industry, our superpower is currently killing ourselves (and feeling resentful afterward), but we need to make *prioritizing* our superpower. That is the only way to return us to a healthy balance and relationship with the rest of our organization.

By never pushing back, never setting priorities and holding to them, and not understanding how to appropriately negotiate priorities when changes *should* happen, all we do is set a completely unrealistic expectation

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Intercom, the magazine of the Society for Technical Communication, is published to provide practical examples and applications of technical communication that will promote its readers' professional development.

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Address Changes: membership@stc.org
Intercom Editorial: intercom@stc.org

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Intercom (ISSN 0164-6206) is published 8 times a year (monthly, except for February, April, June and August) by the Society for Technical Communication, 9401 Lee Highway, Suite 300, Fairfax, VA 22031-1803, a nonprofit educational organization, as a service to its membership. Membership in STC includes an online subscription to **Intercom**. Periodicals postage paid at Fairfax, VA, and additional offices.
Postmaster Send address changes to **Intercom**, Attn: Membership, c/o Society for Technical Communication, 9401 Lee Highway, Suite 300, Fairfax, VA 22031-1803.

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that we will always turn ourselves inside out to deliver *something*—*anything*—in the time allotted. Often, frankly, it is "anything"—and a very low-quality "anything" at that—because we haven't been given sufficient time to complete the job with the appropriate deliverable or level of quality.

Why is this a leadership behavior? Because it's *hard*. Really hard. Having priorities and a rock-hard barrier around them is easy—and will immediately get you labeled "not a team player." Having no priorities and being a pushover is easy—we're there; everyone loves you, and you are frazzled, sleep-deprived, and bitter.

There is significant finesse, however, in developing great, well-justified, and well-communicated priorities and strong, but appropriately flexible and negotiable, boundaries. And it takes strong, diplomatic leadership to maintain those priorities in the face of scope creep, requests from engineering to do "just one more thing," and pressure from executives to do more.

"The most important single ingredient in the formula of success is knowing how to get along with people."

(Theodore Roosevelt)

The second leadership behavior to adopt is *relationship management*—often called "stakeholder management." The most fundamental idea is this: we don't do anything truly alone, and there are likely a *lot* of people in your larger content ecosystem who will be affected and have a stake in the outcome of the things that you are doing.

Those others who have a stake or will be affected by your actions and initiatives might not even realize that you exist or that your initiatives are happening. They might know about you and feel threatened by what you're doing. Either of these has the potential to derail your objectives.

There is a *lot* that contributes to successful stakeholder relationship management, but at its core, success is most influenced by:

- Your credibility, established through your own personal leadership, demonstrated to others by your values, actions, and words.
- Your ability to understand, empathize with, and communicate value to your stakeholders—demonstrated by your ability to interact well with others.

This is no different than establishing thought and market leadership and relating to an audience (customers) as your content is doing; it's just a different—now internal—audience. My recommendation is to approach stakeholders like an audience. You've got to understand them.

- Who are they?
- What are their biggest concerns?
- How do they best learn? What are their communication preferences and style?
- What are their goals? How are they incented and rewarded?

Then, you need to love on them (I know, it sounds creepy, but it works). First, understand how to serve them well. How can you best serve them, give them what they need or what they want? Can you pleasantly surprise them—for example, maybe one of your initiatives got some great results? Finally, do it—serve them well. Deliver something they care about, and communicate about it so that they clearly understand the value and impact of it. Rinse. Repeat. A *lot*. Over-communication doesn't exist in stakeholder management.

Underlying all of this is your own credibility and reputation, which is being built, day by day, whether or not you are consciously working on building it. You are your own first and most important stakeholder—be sure to manage and lead yourself first.

"Everyone needs a coach."

(Bill Gates)

There's more to implementing these behaviors than just deciding you want to make it so. And creating habits around them takes that implementation to yet another level. So what next? The list of resources in the next section will provide you with some great lessons, models to adopt, and voices to follow. Leverage those voices—in their books, as well as in their online resources, newsletters, etc.—to gain some virtual mentoring.

To speed the process, you can also consider hiring a coach. This is especially beneficial when you've been thrust into a leadership position quickly (and perhaps unexpectedly) with little support. Having a sane, objective voice in the mix—and some experienced advice—might save your sanity or your skin. However you decide to go about your learning journey, the key is to take that journey and don't ever stop.

"Leadership and learning are indispensable to each other."

(Balancing the frivolity of Mike Meyers with the weight of John F. Kennedy.)

To help move you forward in your goal of learning more about leadership, as well as gathering some strategies and tactics you can begin to weave into your own behavior, I've included my list of must-have or favorite (or both) books that have contributed to my and others' journeys toward becoming leaders. I've read (and in most cases re-read *ad nauseum*) all of these and provided annotations to help you see how they might fit into your leadership journey.

You will find the list of books and resources on *www.stc.org/intercom*.

"And now, the rest of the story."

(I hope I'm not the only one old enough to remember Paul Harvey!)

Albert Bandura, the David Starr Jordan Professor Emeritus of Social Science in Psychology at Stanford University, said, "Fortunately, most human behavior is learned observationally through modeling from others." And that's exactly what

we're doing in this issue. As you read, you'll be taking a peek behind the curtain at how several different leaders—technical communicators just like you and me—lead. You'll be reading about, and observing through their stories, the behaviors that have helped make them successful leaders in our field—leaders of big things, like large departments of people and company-wide initiatives—as well as leaders of small but equally important things, like peer collaboration and themselves, their behaviors, and their careers.

Wendy Richardson, Senior Vice President of Customer Technical Communication at Mastercard, kicks off this issue with an executive perspective on the responsibilities of leaders in technical communication.

Next, Alyssa Fox, Director of Marketing at Graylog, Inc., describes a huge leadership challenge to drive a global content strategy initiative across an enterprise. She proves that planning and communication are key to bringing your stakeholders along on the right journey with you.

Reducing the aperture from enterprise to personal, Vici Koster-Lenhardt shares her own path of personal career leadership from publishing to technical communication to her current role as a career coach for the spouses of U.S. diplomats working in Central and Eastern Europe.

Through research of introverted leaders like himself, Ben Woelk adds to the growing body of work that is helping the world to better understand introverted leaders and leadership.

Moving the leadership lens to focus on an academic career, Pam Brewer, educator and Director of the Online MS in Technical Communication Management program at Mercer University, shares some important lessons from her career journey and her philosophy of living and careering.

Diving into an ever more detailed view, Erin Friday provides an important perspective on flexibility in your approach to your job—in particular, taking on tasks outside of your job description.

Kim Ivey-Bourne delves into the growing concern of collaboration in the workplace—specifically how technical communicators can take a leadership role in efforts to collaborate online and in virtual teams.

We also have four columns for you in this issue:

- Mark Lewis discusses metrics resources and responsibility.
- Kirk St.Amant explores context, culture, and usability.
- Our new ethics columnist Russell Willerton introduces an ethics case study by graduate student Vanessa Generaux.
- Cindy Currie and Kit Brown-Hoekstra provide responses to questions from readers about management issues.

Noel Atzmiller provides a thought-provoking book review of Sarah Sladek's *The End of Membership As We Know It*, raising questions about the social and organizational changes faced by associations.

And Tony Bove demonstrates how stretching and seeking out new opportunities validates Erin Friday's premise of flexibility. Thanks, Tony, for showing another great perspective on personal leadership!

"Why is this editorial filled with quotes?"

(That's you asking that question.)

Hopefully, the answer is becoming clearer … observing, listening to, and learning from others is critical to the success of any leader. You can't lead in a vacuum.

In the end, though, you need to do and experience leading as well. Mahatma Gandhi captures this brilliantly: "The best way to find yourself is to lose yourself in the service of others." You can find your inner leader by leading, and the best way to do that is by serving others, setting an example, sharing your knowledge and wisdom, and using your unique and amazing talents to get stuff done.

It doesn't really matter where you do it, but here is one final tip: If you want to build and demonstrate your leadership muscle in the context of work, there is no better place than a professional organization (STC, anyone?) to do that. It's a safe environment to try new things, take risks, and even to fail. It serves your industry and provides a society where our entire community can grow.

As attributed to John F. Kennedy (but really a slogan of the New England Council, a regional chamber of commerce), "A rising tide lifts all boats." While it's typically associated with economics and politics, I've recently co-opted it for a #contentmovement espousing the idea that we must all become leaders and evangelists of content and its high value to businesses. And how do you become a leader?

Make relationship (stakeholder) management and prioritization a habitual routine.

Be teachable and a lifelong learner, modeling great leaders.

Find your leadership ability by losing yourself in service to others—like STC.

This is such an important conversation for us to have, so *have a conversation*. Whether that is at a conference, like the STC Summit; on the STC website in response to this article; or on social media—anywhere and everywhere. Let's lift all of the boats … together. #contentmovement

— Andrea L. Ames
andrea@idyllpointllc.com

RESOURCES

Ames, Andrea L. "Embrace Your Power, Influence Will Follow." Presented at LavaCon, Portland, OR, October 2013. *https://vimeo.com/80429431*

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Executive Perspective:

Leadership Responsibility in Technical Communication

By WENDY RICHARDSON

SUCCESSFUL LEADERSHIP in any organization requires a great deal of time and energy focused on setting strategy, motivating people, and driving initiatives that optimize the experience for our customers.

I didn't "grow up" in technical communication. I held several positions across the organization—from Technical Account Management to IT Transformation Manager. So, I relied on a time-tested success strategy: I surrounded myself with the best technical writers, information architects, and technical leaders around. If you're lucky enough to have a strong team, listen, learn, and empower them to take risks and implement innovative solutions. Develop and track meaningful metrics that demonstrate the value your team delivers, and help articulate the value of your content as an organizational asset.

As leaders, it is also our responsibility to ignite (and reignite) the team's passion for what we do and why we do it. By providing a clear picture of the future and how your team's future aligns to the company vision, you help your team understand the evolution of content as it progresses up your value chain, which might look something like Figure 1.

Paint a picture of the three- to five-year journey, and partner with your team on the strategy and tactics to achieve your goals.

Getting There

Along your leadership journey, you'll get advice from various sources; some tips you'll take to heart, and others you'll send to the round file. My five best pieces of advice are:

Lead with Passion

Your team and business partners can sense your enthusiasm for what you do. Each day, re-frame the often-asked question, "What keeps you up at night?" to "What gets you up in the morning?" I hope your answers include "to

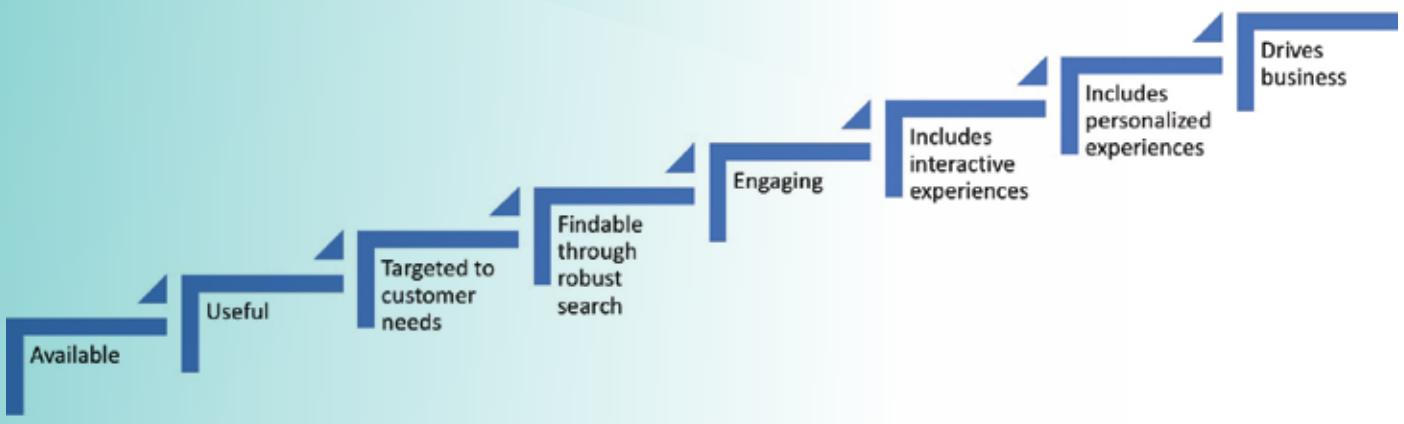


Figure 1. Evolution of Content Value

enhance the experience of my customers" and "to help my team and my organization be successful and productive."

If not, go back to bed, and start over.

Your attitude, energy, and optimism for the future sets the tone for your team. Take the time to regularly recharge your batteries. Carve out time to stop, be silent, and reflect. Dedicate time for vigorous activity. For me, it's a high-impact Zumba class, where I can leave all the frustration of the tough days on the dance floor. Find your outlet—and be ever-conscious of the tone you're setting for those around you.

Empower Your Team and Get Out of the Way

Hire smart, motivated people, and let them do their thing. Micromanagement isn't a deadly sin, but it's pretty close. Servant leaders share power, partner with their teams to set and align the overall strategy, and paint a vision of the future.

Leaders often think we have to have all the answers—but *no one does*. The next time someone approaches you with a challenge, instead of prescribing a brilliant solution, first listen, then probe to see if you can lead them and partner on potential solutions. Building team expertise and *collaborating* on solutions ensures greater buy-in. Instead of "having all of the answers," be approachable and willing to share advice, and foster an environment of continuous learning and exploration to keep skills sharp in the face of rapid technological change and growing customer demands.

Put on Your Marketing and Sales Hat

This applies to leaders and all technical communication employees. In every interaction, you serve as an ambassador and consultant on the most effective methods and processes of technical communication. To be clear, that doesn't mean to start shouting from the rooftops about the criticality and "cool-factor" of your team. Successful marketing and salespeople start by *listening*. Gain an understanding of the top-of-mind issues and challenges of the key stakeholders in your business, like your execs and C-suite folks. Check out their blogs, read articles they've published, and really tune in to town hall and all-hands meetings.

If your executive team has a focus on improving the customer experience, share updates on ways you're improving the quality and findability of content. Share your content strategy, and highlight how the content experience will be interactive and personalized to meet customer needs—and ultimately drive business value. If another exec or business partner is focused on efficiencies and reducing costs, talk about the benefits of content reuse, automated workflows, and publishing. *Know your audience and tailor your message for maximum impact.*

Build Your "Value Story" with Clear Data Points

If you're authoring content in XML, share data points on content reusability, increased consistency, flexibility of output, and lower localization costs. Craft messages in the language that is meaningful to your audience—from execs to business partners to customers. Unless you understand what will "tug on their heartstrings," how will you truly connect?

Reverse Your View

We tend to examine situations from our own perspective. Why is this important to me and my team? What do I/we need to do to succeed? What's the benefit to my team/company?

Turn those situations around: *focus on your audience*. Why is this important to the customer? What does my customer need to achieve their goals? What is the benefit/value to my customer's company?

If you examine situations from this perspective, and then come up with solutions that help make your customer successful, your success will follow.

Be Inspired!

Tech comm leaders and teams: *we* have the power to evolve technical communications from a silo within the organization to a critical asset by:

- Connecting customers with important products and services.
- Driving reductions in customer support calls by developing content to address commonly asked questions.
- Enabling customer engagement with online surveys, gamification, and personalized experiences.
- Driving business by providing actionable insights on usage patterns and user feedback to optimize products and services.

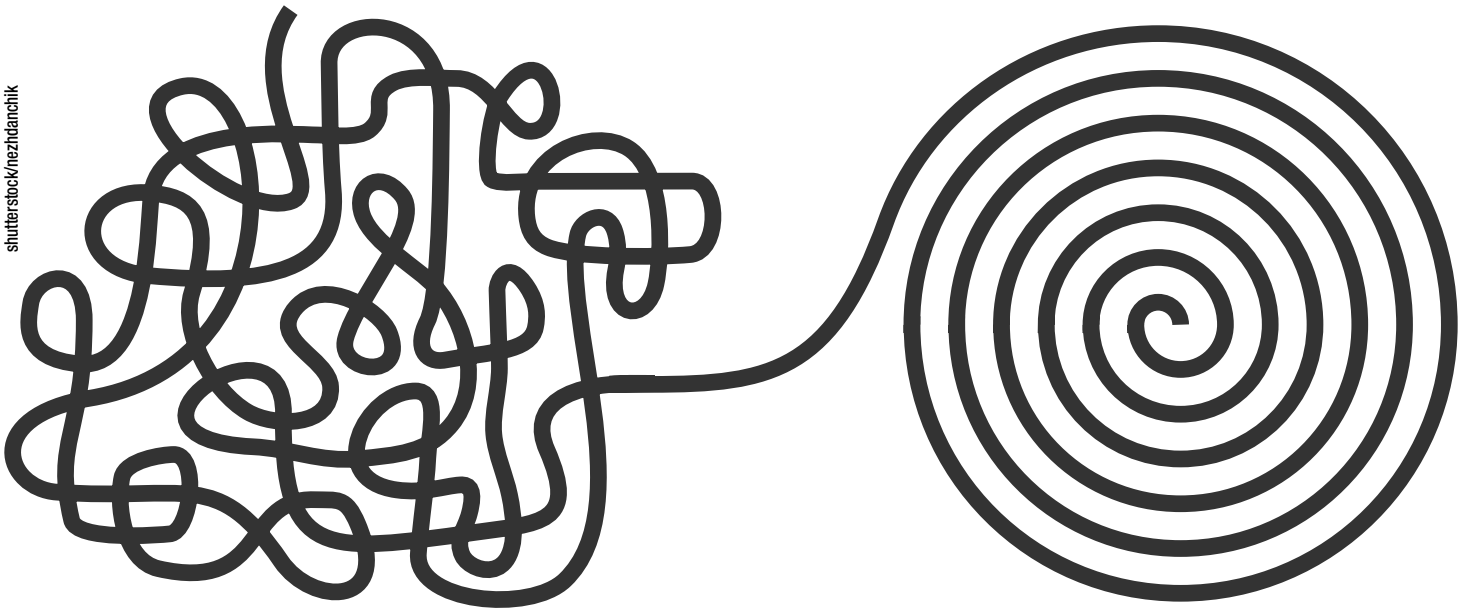
And those are just a few examples! As you further define on your internal (execs, other teams, etc.) and external (customers) audiences, you'll find even more—and more specific—ways to connect your organization and value to the business!

Fellow tech comm leaders: we have an awesome responsibility. The culture of your organization is shaped by you. So take the time to align your team's passion with your purpose, embrace challenges and discomfort as learning and growth opportunities, take time to truly reflect and listen, and show gratitude—never underestimate the power of "please" and "thank you."

Andy Stanley said, "Leaders who refuse to listen will eventually be surrounded by people who have nothing to say." So rally your noisy, opinionated team, and start listening!

WENDY RICHARDSON *(*wendy.richardsson@mastercard.com*) leads the Global Technical Communications team as Senior Vice President of Customer Technical Communications for Mastercard Worldwide. Her team develops and delivers the technical information customers need to do business with Mastercard. The team is focused on improving the customer experience by delivering personalized, findable, and engaging solutions, including technical manuals, release documents, knowledge articles, and online help.*

The Case for a Global Content Strategy:



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A Leadership Case Study

By ALYSSA FOX | *STC Senior Member*

OUR WORLD IS exploding with content. Whether it's a million cat websites, ads on highway billboards, spammy emails you don't want, or flyers on your front door, we are constantly bombarded with information. And that goes for content from businesses and organizations, too. There are white papers, Web pages, marketing emails, user documentation, and a myriad of other content assets being produced daily.

But how much of that is valuable? How do we weed out the junk? More importantly for this article, as content creators, how do we write and publish content that's not junk? If we don't have intention and a strategy behind why we're creating what we're creating, are we really getting anywhere?

I was working as a technical communication director in a large software company when I started my content strategy journey. The more I delved into trying to improve customer experience, the more I realized that *all* of our content played a role in that (see Figure 1). Marketing content was no longer only pre-sales, and technical content was no longer only post-sales. They had to come together. And a lightbulb went off. This is my story.

Figure 1. All content is critical in the customer experience.

Discovering Our Needs

We had just gone through a merger and now had a handful of technical communication groups dispersed across the company. The general manager of the engineering organization where the information development (tech comm) team reported asked me to gather information about each of the groups, determine the best way for them to work together going forward, and set some goals for the combined group for the upcoming year. Fortunately, most of the information development groups were fairly mature in their processes and approach to creating and delivering technical content, so I started looking for ways to expand their visibility and scope and have a bigger impact on the business.

One of the goals I set was to better align the technical content with the story we were telling with our marketing content. At the very least, I hoped to not negate the marketing story with our technical content, but I really envisioned a messaging structure that went from the highest-level company story down to portfolio and product messaging, then to technical content. The company messaging would be about who we are, the portfolio/product messaging would be about how we help customers solve problems, and the technical content would then highlight specific procedures that show how we solve those problems using our products.

With this idea firmly planted in my head, I decided to go talk to our marketing team to see what kind of content they had, where they stored it, and where we might find some alignment in putting together this messaging hierarchy. After a few minutes of conversation with the marketing leadership, it quickly became apparent that the content infrastructure in our marketing organization was in its infancy. There were no documented content processes, no content repository, very little insight into who was working on what, and no overarching strategy for why we were creating the content we were.

As an organization, our overall content challenges included:

- Accelerating demand for new content, but too few resources to keep up.
- Little to no alignment of marketing and technical content.
- No common content repository to enable content reuse.
- No content governance process, which resulted in outdated content, never-ending review cycles, and reduction in seller effectiveness.
- Duplication of effort within and among departments.

I distinctly remember looking at the vice president of marketing with whom I was talking and saying, "We need a global content strategy." And a new path was born.

Building the Business Case

Once I finished discussing with the marketing VP what content strategy is and why it's important, he quickly bought in. We started working on a business case for content strategy in our organization. Since I was pitching this new function—and possibly new headcount—for content strategy to the chief marketing officer (CMO) and general manager (GM) of the organization, I knew they'd want to look at the bottom line. So we created a business case that described:

- The goals for our content strategy.
- The positive impact to the business.
- Cost/benefit analyses for both best-case and worst-case scenarios.
- Next steps in the plan.

We focused on our business goals first, so we could align our content strategy goals with those. Ultimately, we decided on these goals for our content strategy:

- Generate leads.
- Build brand loyalty.
- Increase internal efficiency.

We then highlighted the benefits of a unified content strategy to the business, including items such as multiplying the effectiveness of our content, aligning around our new brand message, and setting up an infrastructure that made the most of our limited resources in a time of many mergers and acquisitions. Then we drilled down even further into specific measurable objectives that could help us realize the benefits we previously described.

Finally, we proposed creating an initial content strategy and running a six-month pilot project for a selected product portfolio to conduct a content inventory and high-level audit, determine content repository and tool needs, and design initial content creation and governance workflows.

The investment required for the development of the initial content strategy and pilot project was only time. We created a small content strategy committee, comprising marketing, information development, and sales enablement team members. This committee built the initial content strategy and defined, evangelized, and ran the pilot. The pilot project itself also required time from the various content creators across functional groups for the selected portfolio.

Running a Pilot Project

Once the CMO and GM approved the recommendation of a pilot project, the Content Strategy Committee selected a portfolio for the pilot. We wanted a product portfolio that had enough content for us to actually see what was going on, but not so much content that we couldn't run the inventory and audit and get some ideas about process in a six-month timeframe. Therefore, we selected one of our "mid-size" portfolios, which had about 700-800 content assets across all content creation groups (Product Management, Marketing, Technical Communication, Professional Services, and Sales Enablement).

Content Inventories and Audits

The Content Strategy Committee started by requesting content inventories from each content creation group. These inventories reflected what was posted on our website, as well as all content that we had lurking anywhere—on individual hard drives, on shared drives within teams, in content management systems or digital asset management systems, and anywhere else we could dig up this content.

Once we had a full list of the content available for the portfolio, for time's sake, we conducted a very high-level audit on each asset to determine whether we should:

- Keep the content as is.
- Keep the content and only rebrand it.
- Keep the content and update it.
- Retire the content.

This exercise gave us a sense of how old our content was and in what state.

Process Workshop

The next activity in the pilot program was a full-day process workshop with representatives from each of the content creation teams. I gave each team a set of Post-it notes and asked them to write an individual step in their content process on each Post-it. I then wrote headings on the board to indicate the Plan, Create, Deliver, and Maintain stages of content. After the participants finished writing out their steps, they placed each Post-it in the stage they felt it most fit.

My goals for this exercise were to:

- Find the similarities and differences in our content processes, so we could use those to build a baseline content process for all of us to use.
- Determine in which stage or stages we were missing steps, if any, so we could ensure we followed the full content lifecycle in our new defined process.

As expected and shown in Figure 2, most of our content activity was in the Create and Deliver stages. We had a few steps from various participants in the Plan and Maintain stages, but those areas were lacking activity with our current processes.

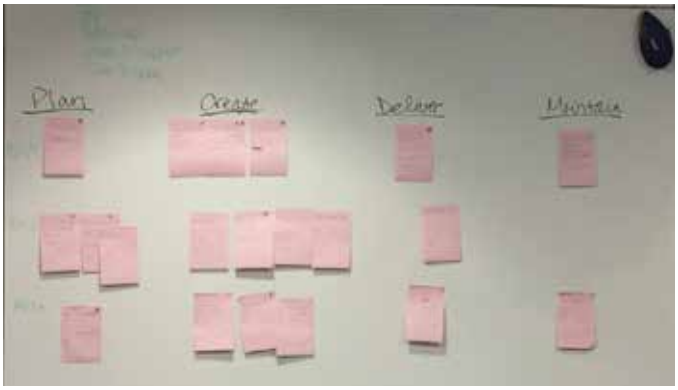


Figure 2. Where our content activity fell within the full content lifecycle.

The Content Strategy Committee used the information from the pilot group to update templates for our content inventory and high-level audit, as well as to create initial content workflows.

Pilot Results

The pilot participants and Content Strategy Committee committed to delivering the following items to the CMO and GM at the conclusion of the pilot:

- Updated content strategy.
- Evaluation of current content creation workflows and content storage/access/search/reuse.
- Evaluation of portfolio fit to strategy.
- Recommendation for additional tools/processes.
- Evaluation of impact on marketing/Info Dev/other stakeholders.

After we delivered the final report from the pilot project, the CMO determined that we needed a full-time content strategy leader in the organization and moved me into that role.

Growing the Initiative

Once I moved into the content strategy role in our marketing organization, I had the daunting task of explaining and evangelizing content strategy and its benefits to the rest of the organization. At first, most people didn't understand the benefits a content strategy would bring to them—the whole "what's in it for me" question—so I had a lot of meetings tailored to specific teams, what they did every day, and how the content strategy could help.

A couple of months into my new role, I was lucky enough to get a senior manager on my team to help me with the effort. Fortunately, the concept and benefits of content strategy clicked for her right away, and she was a powerhouse in helping to drive our initiatives forward. In six months, the two of us were able to:

- Create a marketing content calendar, keep it updated, and influence the marketing, sales, sales enablement, and demand generation teams to use it.
- Start building personas.
- Define an end-to-end content workflow.
- Start a component content management system (CCMS) evaluation.
- Build the framework for a "writing for atomized content and SEO" workshop for content creators.
- Build a blog editorial calendar, working with the social media team.
- Set up metrics for tracking whether our content was findable and usable by prospects, customers, partners, and sales.

The funny thing about the whole effort was that we were looking to add strategic planning around our content to our organization, but we had many tactical things to set up before we could proceed with the strategy in many places. Regardless, we worked on both strategic and tactical initiatives simultaneously as we built out the function and team.

Conclusion

Shifting my focus from creating and managing technical content to building a global content strategy that encompassed both marketing and technical content was exhilarating, difficult, educational, frustrating, and incredibly fun. The traction we gained in only six months showed me just how much people had been crying out for some of this structure and planning, once they understood what we were doing and why. It opened the doors for building an even better infrastructure. And it connected siloed teams in a way that they hadn't been in the past.

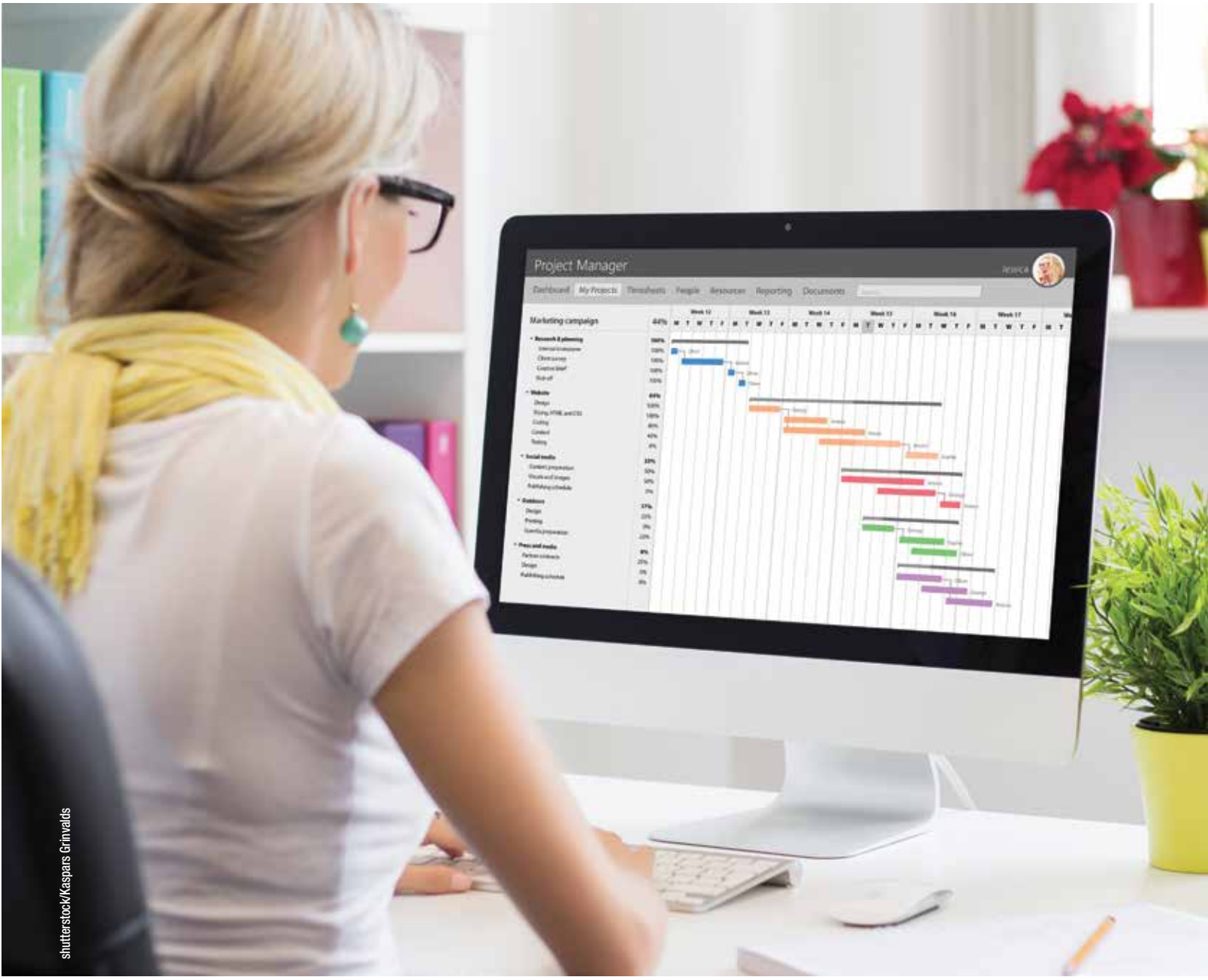
This article only covers the highlights of how we got our content strategy initiative off the ground; there are a million details that go into an effort like this. If you're looking to implement something similar in your organization, my best advice would be to:

- Know your business goals, and align your content strategy to those.
- Plan the objectives and tactics from there.
- Be patient, because this takes time—it took me a year to get from the idea to a full-time content strategy role.

Remember, every step you move forward takes your content to a better place than it was before. And that takes your organization to a better place than it was before. Content strategy solves business problems, and that's right where you—a content leader or practitioner—want to be.

ALYSSA FOX *(*alyssafoxstc@gmail.com*) is a content strategist and marketing leader who thrives on improving customer experience through brand consistency and relevant information. She's a champion for cultures that position content to drive leads, revenue, and customer retention. Alyssa has vast management experience across global teams and has worked on numerous cross-functional initiatives to improve processes and communication across organizations.*

CONSCIOUS CAREER LEADERSHIP:



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How I Managed My Career Journey Like a Project with Multiple Deliverables

By VICTORIA (VICI) KOSTER-LENHARDT | *STC Fellow*

THE FANWOOD, New Jersey, police invited me to attend a town hall meeting about guns. It was 1982, and a child had been injured due to a gun in the home. I was the only stringer who was a resident of Fanwood for *The Courier News*, a Gannett regional newspaper. Being a resident was a requirement to attend the meeting. It was my first paid writing gig with a byline and the kickoff of my career as a communication professional.

Back then, I had to physically drive to the newspaper's headquarters on Route 22 to write and file my story and speak with the night desk editor. It was a 30-minute drive. Now, in 2018, technology has come a long way in terms of filing a story, but the skills and resources used to create structured, fact-based, informative prose have remained the same.

Thirty-five years ago, the skills I learned studying journalism at New York University led to a writing job on an automotive magazine in Manhattan published by The Hearst Corporation. Later, those same skills enabled me to land a job with The Coca-Cola Company in Vienna, Austria, as a Senior Technical Writer. I also worked as a Documentation Department Manager, Public Affairs and Communications Lead for the company's IT organization, Regional Software Trainer, Content Manager for the company's new intranet, and a leader in rolling out cutting-edge technologies and customer experience methods globally for Coca-Cola. I led usability initiatives in the software development cycle in the mid-1990s, started an STC chapter and community in Europe, taught project management to newbie project managers, served as the first member of the STC Board of Directors who lived and worked outside North America, rolled out a pre-DITA enterprise-wide documentation transformation, and lived in Europe with the love of my life. Talk about a career with multiple deliverables!

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Phase I: Identify the Goal

Like any project, my goals were clear in 1980: I wanted a career in publishing. When I moved to Vienna, Austria, in 1987, I envisioned a continuation of the career I had started in America. For me that meant working for an internationally known company, having growth opportunities, and living in a major, metropolitan city. That it would be challenging, as projects can be, wasn't a barrier. As any good project manager knows, project management is all about managing the challenges so that they contribute to success instead of causing failure.

Phase II: Recognize Progress Made and Make Adjustments

Although I had made multiple career transitions at The Coca-Cola Company, the most significant was when I left the company in 2010 after 21 years of service. Working with a career coach, I learned first-hand to manage my career transition as a project. I had to take a different approach. This wasn't anything "as simple" as expanding my role. I was embarking on a new phase of my life, and the only person who would find a job for me was *me*. With a couple of false starts—there are always things we plan that just don't work out the way we expect—I finally settled into a new career in 2013.

Today, five years later, my business card reads "Job Search Strategist and Career Coach," and I am now a consultant for the U.S. Department of State. Yet, I am still a communication professional at heart. I belong to a small demographic that has been able to find employment for the majority of my working life that fit with my college degree. Now, the work I do is based on the relevant skills I have honed and acquired *along with* my communication background.

Phase III: Discover the Key Learnings

There's a saying in German: "*Alter macht sehend.*" Loosely translated, it means "with age we have a better view." At a certain point in life, I began to see all that I was and realized that I could leverage all of my skills and experiences to do what I wanted. In career management, this translates into finding your transferrable skills. When I was asked to share my story for *Intercom*, I gave some serious thought to the transferrable skills that have brought me to this point in my career. Identifying key lessons is taking time to reflect on what's worked and what hasn't.

On a broader level, I thought about transferrable skills in the context of three areas:

- Transferrable skills of technical communicators.
- Colleagues, friends, and mentors who have made successful career transitions using their technical communication career as a jumping-off point.
- Opportunities for career choices in 2018.

[C]onsider what you want to be known for, and go for it. There's still time to create the career you want.

Transferrable Skills of Technical Communicators

In the mid-1990s, Paula Berger, then the co-owner of Solutions, asked me to participate on her trends panel at the annual STC Technical Communication Summit & Expo. Participating on this panel were also Barb Giammona and Bogo Vatovec. The trends we talked about then are still valid today:

- Project and program management
- Tools and technology
- Writing and editing

Several years later, Jack Molisani and Andrea Ames joined the panel and contributed their own perspectives. For more than two decades, we've all continued to loop back on the importance of having skills in these areas. The only trends that change constantly are the tools and technologies. Once you have a technology project under your belt, however, you're ready for any new technology that comes along. If you are fretting about artificial intelligence (AI) and Information 4.0, stop. You have what it takes to lead and lead well.

Successful Tech Comm Career Transitioners

When you begin to identify your skills and to unpack your experiences, you will find you have numerous transferable skills. For example, taking the same set of individuals who participated multiple times on Paula Berger's Summit trends panel: tech comm skills led to writing a book (for Barbara); running a consulting business that supports companies transforming their businesses (for Bogo); managing diverse, global, technical writing teams (for Paula); planning conferences and events (for Jack); providing services that transform content teams through defining the right roles, establishing the right processes, and systematizing and modernizing (for Andrea); and career coaching (for me).

Career Opportunities in 2018

I attended the Social Media Marketing World Conference in 2013 with the intention of getting exposure to what felt like a parallel universe of the technical communication community. Conference speakers were talking about the importance of writing and editing skills to scrub the content of the sound of multiple content contributors. They were talking about content creation and understanding audiences. Nothing new. What was new: they were using skills that I had labeled as technical communication skills to create other types of communication. They were working in companies that allocated more money to their projects and departments than to the technical documentation projects.

One of the speakers who caught my attention was Mark W. Schaefer. He spoke at the 2018 conference in March about his new book, *Known*. I don't know him personally, and I'm not plugging his book, but I think he is on to something, and I believe that technical communicators should pay attention. Mark's research has shown that anyone can become known, even if they haven't spent years becoming the expert. Think about that for a moment, and let the concept sink in. Allow for a shift in your thinking to take place. Then, consider what you want to be known for, and go for it. There's still time to create the career you want. When you review your own key learnings, you will uncover ideas that will astonish and surprise you.

Phase IV: Start the Next Project with Clearer Goals and More Experience

Technical communicators have a foundation and mix of skills that can accelerate a journey to "being known" when a niche is identified. I witnessed this in my career after working in the international corporate world as a female manager in technology. I wanted to share my experiences. I thought I would do this through volunteering. Instead, I found paid employment coaching Americans living in Europe to find meaningful work. It also allowed me to serve my country after living abroad most of my life.

When friends and colleagues learned of my career transition and my new job in 2013, they said, "This is a perfect fit for you. How did you find it? Did they create the job for you?" There was no easy answer. On reflection, I realized I had managed my career transition like a project. I had defined the project goal of finding work that would allow me to give back and share my career experiences while having time for enjoying life with my husband. I then tried different approaches and adjusted as needed. Now, I review periodically what's working and what's not. Then I move forward onto the next project knowing that I'm getting better and better at managing my career.

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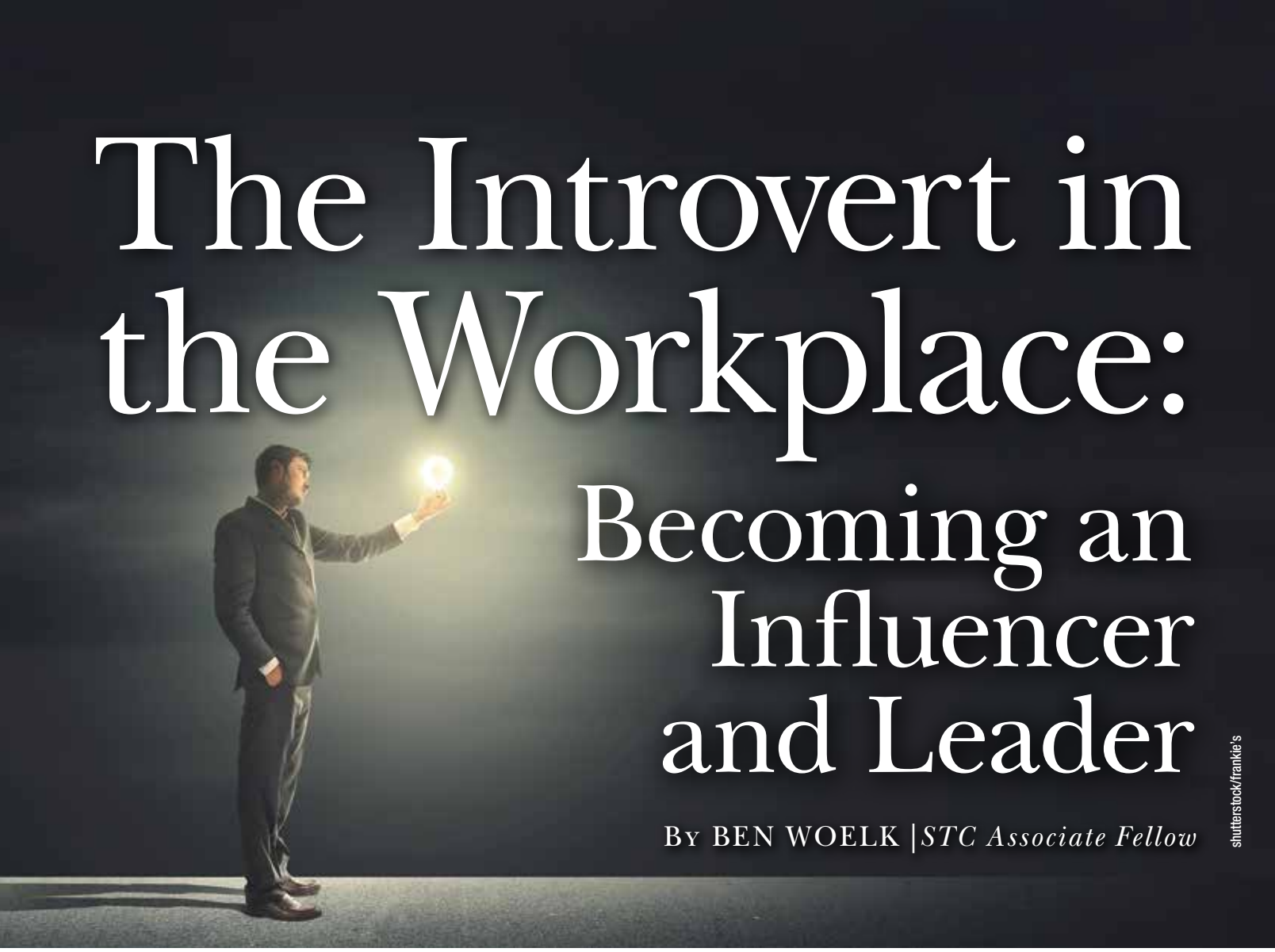
(vkosterlenhardt@gmail.com) *provides job search and career coaching services to spouses of U.S. diplomats working in Central and Eastern Europe. She is an STC Fellow and lives in Vienna, Austria.*

The Introvert in the Workplace: Becoming an Influencer and Leader



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By BEN WOELK | *STC Associate Fellow*

LEADERSHIP IS DIFFERENT for introverts. We're not comfortable in the spotlight, and we don't like telling people what to do. We don't fit the stereotypical, hard-charging, charismatic, followers-hanging-on-their-every-word type of leader lionized by Western culture. We don't always use direct means to accomplish our goals, finding that we can achieve the same results indirectly without conflict. In fact, we tend to operate as if we were in an Eastern culture. *East Meets West: An Infographic Portrait* by Yang Liu (*http://bsix12.com/east-meets-west/*) provides a fascinating set of graphics that display the cultural differences between life in Germany (the West) and life in China (the East). Those cultural differences are very similar to the differences between how extroverts and introverts relate to the world and each other.

Many introverts struggle to succeed in the workplace when asked to "think on their feet" or to make decisions without an array of well-studied facts in hand. Some introverts might look for leadership opportunities, but feel stymied when trying to figure out how to progress in their careers. Although not every introvert is interested in a formal leadership position (nor has the opportunity in their workplace), every introvert has the ability to become an influencer and to make a difference.

I've talked quite a lot about my experiences as an introverted leader (*benwoelk.com*) and the strategies I employ to be successful in and outside the workplace ("Lessons Learned On an Introvert's Journey to Leadership," *https://er.educause.edu/blogs/2016/10/lessons-learned-on-an-introverts-journey-to-leadership*). I recognize that my experience may not be normative, however, and I thought it would be worthwhile to share the experiences of other introverts in positions of leadership or influence.

I sent a brief questionnaire to five introverted leaders, inside and outside of STC and technical communication:

- Alisa Bonsignore, current STC Director and Principal of Clarifying Complex Ideas, a strategic communication consultancy in the San Francisco Bay Area.
- Kirk St.Amant, Professor and the Eunice C. Williamson Endowed Chair in Technical Communication at Louisiana Tech University, and Adjunct Professor of International Health and Medical Communication with the University of Limerick (Ireland).
- Sara Feldman, President of the San Diego Chapter of STC and a technical writer with experience primarily in the software industry, focused on online support.

- Eeshita Grover, a Senior Manager at Cisco with more than twenty years in the content industry and a career that spans writing, teaching, and managing technical writers.
- Tara Schaufler, Senior Information Security Training and Outreach Specialist for Princeton University.

The questionnaire asked about:

- Introversion-related challenges in the workplace.
- How the respondents leveraged their unique abilities as an introvert.
- How they acted as a leader or influencer.
- Recommendations for other introverts in the workplace.

Introversion-related Challenges

As you can see from their titles, the respondents are employed in a variety of workspace settings. Although their responses differ, there are some threads that are woven throughout.

As the sole principal of her consultancy, Alisa is quite happy in her current work because it gives her control over client interactions, most of which occur in one-on-one conversations. In her corporate jobs, Alisa had to work hard to make her voice heard and was more inclined to let the more outgoing personalities battle it out in a meeting while she took notes and tried to find a middle ground.

For Kirk, his challenge as an introvert has been working in a role that involves acting like an extrovert on a regular basis. He plays this role across a range of very different activities, from teaching, to conference presentations, to meeting with community partners, clients, and other university colleagues—often in an 8- to 10-hour period with no downtime.

Leveraging Introvert Strengths and Abilities

Introverted strengths include:

- Strong listening and analytical skills.
- The ability to dive deeply into a topic.
- The ability to participate in a team without seeking a lot of recognition.

Kirk finds that his ability to simply listen to what others have to say and encourage them to share their ideas and opinions helps them know that they've been heard. He also encourages multiple parties to speak *with each other*, instead of speaking *at each other* when meeting to discuss ideas.

Eeshita says that her introspectiveness helps her think ahead in a conversation. She also believes that her higher empathic abilities and sensitivity to others' emotions help her in handling difficult situations with patience.

For Sara, she finds that she doesn't focus on socializing at work or getting distracted by thinking about how other people feel about her. She tends to get along well with coworkers, but focuses more on the work and results than on putting energy into maintaining work-related social groups.

Influencers and Leaders

There isn't one type of influencer or leader that fits all introverts.

Alisa finds that most of her influencer or leadership roles don't fit traditional models. She identifies the following roles she's had at different times in her career:

- Project management
- Mentoring
- Thought leadership expressed through blogging, podcasting, writing, speaking, and teaching (about work or non-work-related subjects)

Kirk acts as an influencer by helping others bring their ideas to completion. He fills that role by working as a conference chair or organizational officer to expand conferences and meetings and encompass more diverse groups to exchange perspectives, or by using his position as editor to encourage others to develop their ideas, revise their work, or collaborate with different partners or parties they might not have considered or known.

Tara has found that it's important to not be afraid to lead or speak up. She takes advantage of opportunities to be in the spotlight even though she knows it will be physically exhausting. Tara volunteers to lead discussions during in-house conferences, and she volunteers to give presentations in group settings.

Extroverts and introverts react very differently to heavy interaction in groups. While extroverts find interactions energizing (within reason), introverts find that group interactions may be draining, and need solitude to recharge.

Recommendations for Introverts in the Workplace

I asked our respondents what they recommend for introverts who are interested in increasing their influence or taking a more active leadership role.

Early in her career, Alisa says that she fell into the trap of being "the quiet one." The less she contributed, the more she felt no one really wanted to hear from her. Alisa points to the importance of realizing that the leaders we see around us did not become leaders overnight. Continuous learning was a big part of their growth process.

Improving Meeting Performance

During last year's Revive and Thrive workshop at Summit 2017, one of the issues we discussed was the difficulties introverts face when attending a meeting and being asked to give their opinion or respond to questions "on the spot." A few weeks after the workshop, one of the participants mentioned that his manager had commented on his poor performance in meetings. In a follow-up conversation, the participant said he had addressed the issue by meeting with his manager before the meeting to preview what they would be discussing. This helped him to perform better, because he wasn't hearing things for the first time at the meeting.

Alisa also recommends that you engage in an area that you're passionate about, whether or not it's work-related. By doing this, you're able to convey that excitement through such activities as writing, blogging, being a docent, teaching, or mentoring.

Kirk recommends maximizing your innate introvert ability to listen to others in a way that makes them feel heard. Then he advises using that skill to help others focus on what they really wish to do or achieve, or to help them get to the root of the problem that concerns them.

Eeshita makes the point that quiet people have the loudest minds. Underneath that apparently placid introvert exterior is a mind that grapples with the possibilities. Trust your opinion and don't be shy to share.

For Sara, it's important for us to acknowledge that being an introvert influences how we need to rest and regain energy. However, that need to recharge does not make you less effective at work or less able in leadership positions.

Tara states passionately, "Push yourself!" Tara used to be afraid to step outside of her comfort zone, but understands that working outside of her comfort zone is essential to growth.

Other Thoughts

Some of the respondents offered additional thoughts on their experiences as introverted leaders.

Alisa restated that it's easy to look at someone that you see as a leader today and assume that they always had a plan. In her experience—not so much. Alisa believes that life is a series of seemingly random choices that build over time. Early in her career, she never imagined being on a board of directors. She never thought that she'd have international clients and several speaking engagements a year. In her words, "none of this would have happened if I'd just been 'the quiet one.' I had to find my voice, sometimes through trial and error. Those errors make me empathetic and relatable. For me, that's what leadership is all about."

Kirk believes that the greatest challenge for introverts involves the focus on *self* that seems to be the nature of social media and other online formats. He recommends that we use those formats and technologies in ways that highlight the achievements of *others* both in our field and across disciplines. As we do so in ways that encourage others to follow that lead, we become influencers. Kirk says that we should focus on engaging in such activities in ways that foster or encourage collaboration.

Sara says that the most respected leaders are often those who:

- Don't lead with their ego.
- Are willing to admit mistakes.
- Don't take things too personally.

She says this holds true both for extroverts and introverts. Leaders should focus on the team and results, because the best leaders know that it's not about them anyway.

In Closing

I identify with many of the statements of these introverted leaders. Like Alisa, I didn't see myself in leadership roles or speaking passionately about introverted leadership. (If you'd told me ten years ago that I'd be a leader, mentor, and speaker, I'd have told you that you were crazy.)

It's important to realize that as introverts, we have a great deal to offer and can make a difference. It's also important, as Alisa points out, to understand that leaders aren't made in a day. Leaders are the sum of many life experiences and choices. The key is that leaders are willing to be uncomfortable, recognizing that stretching ourselves can be painful but absolutely necessary for growth.

Read up on introversion and leadership. Explore MBTI, *Keirsey.com*, and other tools that lead to self-understanding. Engage and network with others. Identify and develop your talents and follow your passion. Both introverts and extroverts can be influencers and leaders. You just need to do it in the way that works best for you.

BEN WOELK *(*ben.woelk@gmail.com*), CISSP, CPTC, is Vice President of STC. A frequent conference presenter, Ben has received numerous Society and local awards, including the 2017 STC President's Award. Ben's 20+ years techcomm experience includes management, SW and HW documentation, ISO 9001 documentation, instructor-led and web-based training, end user communications, and policies and procedures. Find Ben on his website,* Benwoelk.com*, or on Twitter as* @benwoelk.

Communicating Our Value

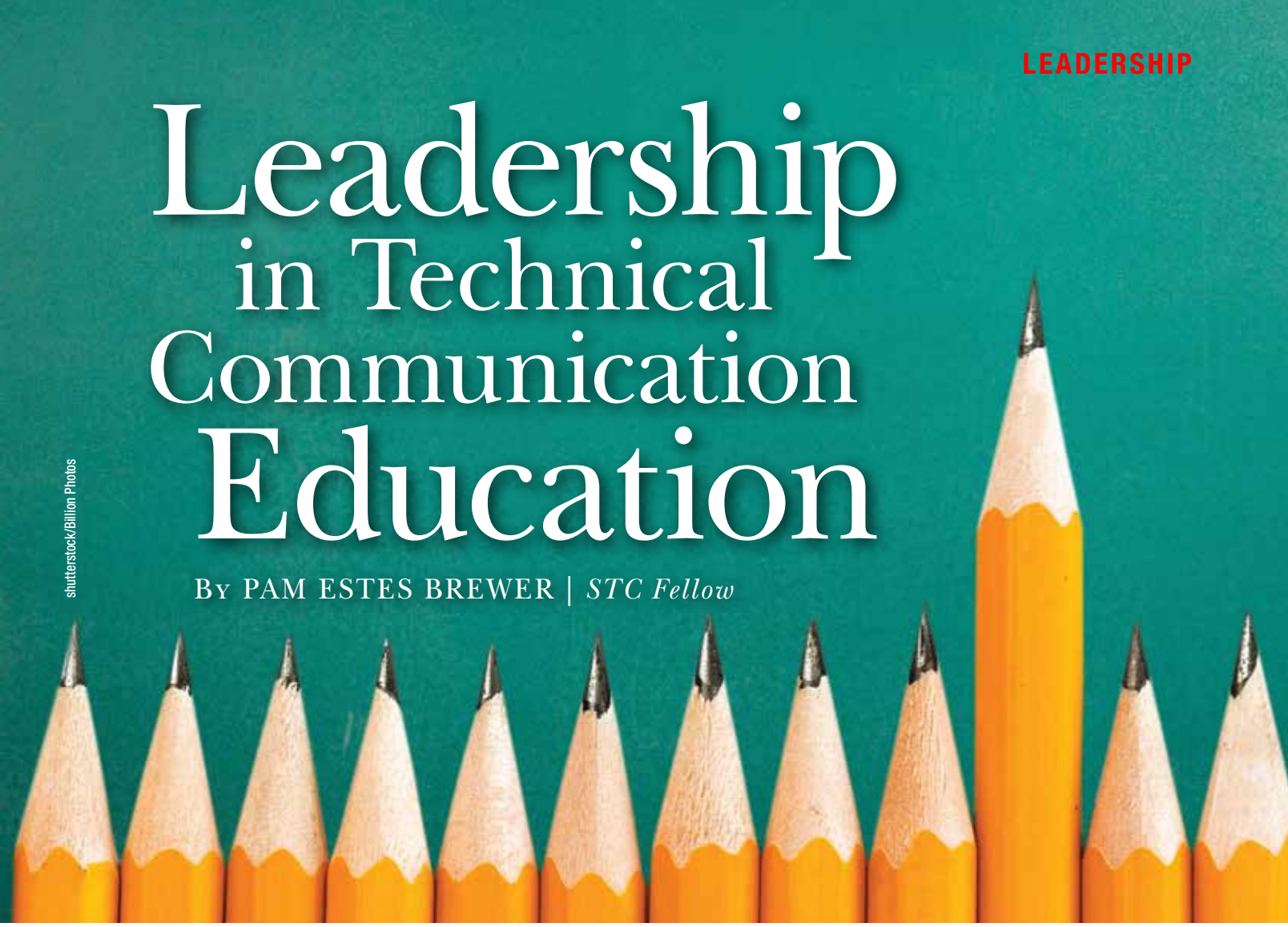
One of the issues that many introverts face is that they don't feel valued—or sometimes even noticed—by their employers. They see raises and promotions going to others who may not be as qualified but are more visible. Many of us assume that our contributions will be seen and acknowledged, and that we'll be rewarded appropriately for them.

That assumption, however, might not be warranted. It's often difficult for an introvert to "blow one's own horn," as we're often reticent to talk about our accomplishments and contributions. Not only might we find that our contributions aren't acknowledged if we don't communicate them overtly, we also might find that others take credit for work we've done.

Here are some ways that introverts can communicate value:

- Provide biweekly summaries of activities and accomplishments.
- Share your analytical abilities by blogging about areas of interest.
- Get a meeting agenda early enough to prepare.
- Work on verbal communication skills by delivering presentations—gain skills from comedy improv or Toastmasters.

Leadership in Technical Communication Education



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By PAM ESTES BREWER | *STC Fellow*

LEADERSHIP IS a complicated topic and one that's difficult to explain in general terms. Often, it's easiest to learn from an example. As someone with a technical communication career in education that I love, and as a leader (directing an online graduate program and a usability lab), I am happy to share some ideas that I use every day—what worked for me and how I got here.

A Little Background

I began my career as a technical communicator in a small software company with my MA degree. From there, I went to a larger software company (now known as LexisNexis®) and a position as a communication analyst. Then, one day, following a big life change, I cashed in all my retirement and stock options and headed to Europe for an "undetermined" length of time. It was life-changing, but it ended up costing me a small fortune in lost stock options! Still, wandering Europe was a dream, and I don't think we should delay all of our dreams until the perfect time. During that time, I decided that what I wanted to do was teach technical communication, and I made the change from industry to education by teaching at a community college.

I think teaching is a calling, and you either love it or hate it. I loved it. However, I didn't have my PhD, and I returned to school years later to earn it. While the PhD is costly in time and money, I knew I needed it if I wanted to make a career as a university teacher and researcher. I now do what I love, including teaching, directing the online graduate program and the usability lab, consulting, and volunteering. It's a busy life. It's a good life.

A Philosophy of Living and Careering

Everyone should have some concept of what is most important to them so that they can craft a life and career that are satisfying. Wandering Europe is great; wandering through a career is *not* so great. My philosophy on life and work has remained steady, with a focus on four ideas.

Put Family First

When I started my career, it was considered a sign of career weakness for a woman to acknowledge family demands. I played that game for a while, but once I began advising students, I wanted them to know that they have a choice in how they build their lives. While you can't have it all, you can set your priorities, be the leader of your own successful career, and put family where they belong: first in line.

Walk Through the Doors that Open for You

I don't mean that you should walk through every door indiscriminately, but a career can have a much stronger trajectory if you spend time walking through the doors of opportunity that are opened to you rather than trying to knock down the ones that are stuck.

Work Outside Your Comfort Zone—at Least Occasionally

I always learn so much more than I expect when I extend myself. My recent run for election as STC Vice President was certainly one of those experiences for me. I didn't win, but I ran the race. In doing so, I learned more about myself, STC, and the field of technical communication.

Do Good—Find Your Passions

Every person should contribute something good to this world—call it a little payback for being here. I try to give something back to community and profession.

Three Practical Tips to a Successful Career

In my daily avalanche of work, I practice three strategies that help me keep things moving and effectively prioritized.

Name It to Control It

Robin Williams, the designer, inspired me with her Joshua tree epiphany from her 2004 book, *The Non-Designer's Design Book*. She essentially said that she used to drive by a lot of Joshua trees every day and had no idea that she had done so *until* she found out what a Joshua tree looks like and what it is named. Once she knew that, she noticed all the Joshua trees! This example of naming something to gain control of it has become one mainstay of my leadership approach. I share it with my students as they try to master skills in good design and writing, and I use it to shape my own career.

For example, as you likely do, I notice effective leadership (and not-so-effective leadership)! I regularly observe the leadership styles of effective leaders and try to "name" their secret to leadership. In some cases, I ask the person outright about his/her philosophy of leadership. Once I have named these strategies, I have the ability to use them myself. Here are some examples I have learned from.

I once asked Sam Dragga, then chairing the Department of English at Texas Tech University, about his philosophy of leadership. He said, "*I try to help people do their best work, and I ask them to give me the words to get them what they need.*"

Helen Grady serves as the Chair of the Department of Technical Communication at Mercer University, where I teach now. She is a very effective leader. In a nutshell, *she never takes shortcuts*. If she has committed to doing something, you can count on it being done very well.

Mike Leonard, when serving as Senior Associate Dean for Mercer's School of Engineering, tried to *listen carefully to people and then find the golden mean for action*. Such expert leadership advice surrounds you if you claim it.

Editor's Note: Take Time to Look Back

Writing an article like this provides an opportunity to look back over your life and career—no matter how long or short it might be—and reflect on where you've been, where you're going, and how you're going to get there. This is something that great leaders often do on a regular basis, and for those of us like Pam, who mentor or educate others in the field, we might reflect like this more often than most as we try to provide the best possible advice and information to our protégés. As a leader of your own life and career, provide this type of insight to *yourself* on a regular basis. You'll be glad you did! —Andrea Ames

Create Goals—and Let Them Guide You

Keep your goals and objectives in front of you, update them regularly, and budget time so that the *urgent* doesn't replace the *important*.

I revise my goals and objectives every one to two months. I keep them on the walls of my office on a number of white boards. And I plan to give each objective a certain number of hours per week. I then track those hours on the boards. Keeping the goals in front of me visually keeps me focused. Budgeting hours weekly keeps me moving forward steadily. I often can't budget at the daily level because too many unknowns occur. But over the span of a week, I can usually hit my goals in each area and keep positive motion in each.

Don't Open Your Email First

Don't look at your email each morning until you have outlined your goals for the day. A final quick tip: I often delay email until after I have looked at my goals *and* finished a research commitment each morning. Email can destroy productivity as easily as it can help.

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Pam earned her PhD in Technical Communication and Rhetoric from Texas Tech University. You can view her credentials on LinkedIn at https://www.linkedin.com/in/pamestesbrewer/.

Stay Flexible to Stay Employed

By ERIN FRIDAY | *STC Member*

EMPLOYMENT IS CERTAINLY preferred over the inverse, and staying flexible and accepting new tasks in addition to your regular technical communication work can help you grow your skills and career as well. After 14 years of writing technical documentation for software, I've seen many technical communicators come and go (myself included), and I found that taking the initiative and being a team player and a leader by volunteering for, and accepting, new and additional tasks will help you to improve your deliverables, stay relevant in the company, get promoted, and ensure that you remain employed.

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For example, I once worked for a large government contracting company on-site at a government agency. As is fairly common practice in the government, the budget was cut, and the three contract technical communicators (including myself) were the first on the chopping block. Because I constantly asked to do more outside of technical communication, I was transferred to another division as a Business Analyst. My two colleagues, who refused to perform any tasks outside of technical communication, were unceremoniously let go. I directly attribute this turn of events to my flexibility.

Sometimes I'm asked by a manager or project manager to work on new tasks, and other times I must seek them out. Because technical communicators have so many transferable skills (excellent verbal and written communication skills, understanding of the user experience, attention to detail, etc.), it's logical that managers would look to us for additional tasks, such as:

- Gathering requirements
- Testing software
- Leading projects as project managers and scrum masters
- Managing Web content
- Writing standard operating procedures (SOPs)
- Working the help desk
- Training users
- Editing all user communications, including emails and marketing materials

Additional Tasks Using Existing Skills

The tasks listed above require knowledge and training to perfect, but any technical communicator can easily pick up that knowledge using existing skills. The sections below describe the required skill sets and the benefits acquired in accepting these tasks.

Gathering Requirements

You will need verbal communication skills, written communication skills, organizational skills, an understanding of the user experience, ability to interview subject matter experts (SMEs), attention to detail, initiative, and critical thinking skills.

Gathering requirements involves interviewing SMEs (in this case, the client), organizing the information that specifies what they need, and communicating that to the rest of the team. Free tools are available online to help you write and organize the information, such as use cases and product requirements documents (PRDs), so all you need to get started is to set up and lead a meeting with the client.

By agreeing to this task, you learn the business rules and purpose of requirements directly from the client, which benefits your knowledge about the product and your end-user deliverables. Interreacting with clients typically includes upper management, and getting more exposure to upper management can benefit you in the long run.

Testing Software

You will need written communication skills, an understanding of the user experience, attention to detail, knowledge about the product, and critical thinking skills.

Testing software involves creating procedures (test cases) for what you plan to test, executing the procedures, and then reporting the results. You must communicate with business analysts to understand the requirements and with developers to resolve any failed tests.

When testing software, you learn detailed information about the software and develop relationships with business analysts, developers, and testers who can help improve your documentation.

Leading Projects

You will need verbal communication skills, written communication skills, organizational skills, time management skills, problem-solving skills, initiative, critical thinking skills, and leadership skills.

Leading projects, either as a project manager or a scrum master, requires initiative, planning, and managing tasks, times, and people. Critical thinking is a must to help the team overcome impediments and to help the project succeed by achieving the goals on schedule.

While managing projects, you gain experience leading a team, which can easily lead to a higher position and salary. While it is tough to juggle this task in addition to your regular technical communication tasks, I can attest that it can be done, and it can even help your documentation's content and breadth. By understanding all areas of the lifecycle process and interacting with all members of the team as a project leader, you can identify holes where additional documentation is needed and ensure that documentation and SME review tasks are included in the project plan appropriately.

Managing Web Content

You will need written communication skills, organizational skills, an understanding of the user experience, and attention to detail.

Managing Web content can take many forms, including writing and maintaining a website's verbiage, error messages, reports, document library, etc. I encourage all technical communicators to take the initiative and request to perform this task, as our skills can help ensure the best product. With our help, the content of a website can be grammatically correct, consistent, and efficient, which ensures the website is professional and helpful.

In addition to providing an exceptional product, accepting this task helps you to learn more about the website's functionality, which in turn helps your deliverables.

Writing Standard Operating Procedures (SOPs)

You will need verbal communication skills, written communication skills, organizational skills, ability to interview

SMEs, attention to detail, knowledge about internal roles and processes, problem-solving skills, and initiative.

Writing SOPs involves interviewing SMEs about a specific process, documenting it, sending it out for review, and ensuring it is distributed and implemented. The creation process is similar to creating end user documentation, except the audience is typically your internal team.

Documentation can typically be forgotten in a process, so participating in writing SOPs can ensure documentation is included in every process. Depending on the SOP needed, you may work with upper management, project managers, etc., to help create the document. As I mentioned previously, getting more exposure to upper management can benefit you in the long run.

Working the Help Desk

You will need verbal communication skills, written communication skills, organizational skills, understanding of the user experience, knowledge about the product, problem-solving skills, initiative, critical thinking skills, and leadership skills.

Working the help desk involves answering calls or emails from users about the product. Each call/email must be logged with a detailed description and followed up on in a timely manner. You must have the leadership skills to triage a call/email, contact the appropriate SME, and escalate it when necessary to resolve the issue.

You learn first-hand about how users use the product and the issues they face while working the help desk. You can include the solutions to these issues in your user guides, FAQs, online help, etc. Your users may be the public, but they may also be your customer or client, and getting positive feedback from the client can benefit you and your career.

Training Users

You will need verbal communication skills, written communication skills, organizational skills, an understanding of the user experience, knowledge about the product, initiative, critical thinking skills, and leadership skills.

Training users involves researching functionality and best practices, creating a training plan, creating a presentation, and then presenting it. Typically, you will prepare and present the training by yourself, so being a self-starter and having strong leadership qualities is extremely helpful.

You can learn more information about the product's functionality and receive feedback directly from users while training them, which in turn helps your other deliverables. Also, you will be presenting to users, which could include your customer or client, and getting positive feedback from the client can benefit you and your career.

Editing All User Communications

You will need written communication skills, attention to detail, knowledge about the product, and editing skills.

User communication can mean bulk emails/e-blasts, marketing materials, newsletters, social media messages, etc. Typically, the writers of these materials will also edit them, but a technical communicator's editing skills are typically more advanced.

User communication deliverables are typically short, and editing them requires very little commitment. Helping with this task is beneficial, because these communications are visible to users and clients, and any communications with clients can get you visibility with upper management.

Pros and Cons

The pros of accepting additional tasks outside of technical communication far outweigh the cons. By accepting additional tasks, you can (among other things):

- Learn new skills
- Get more facetime with clients and upper management
- Develop your leadership qualities

If a promotion into management is part of your plan, then accepting the appropriate additional tasks can set you on that path.

The downside of accepting additional tasks includes time spent away from your main work and the potential of you not succeeding in an additional role. The consequences of not accepting new tasks can be dire and may result in not being promoted or even losing your job. The best way to retain your job security is to remain relevant and be an integral part of the team; this is something that can be easily accomplished by being a team player and accepting additional tasks, whether they are part of your normal job or not.

Conclusion

You don't have to learn new skills, take training courses, or change careers to be a flexible team player. You can show management that you are a team player and a leader by being flexible and accepting new tasks that use the skills you *already* possess. If you aren't *given* opportunities to accept new tasks, then volunteer in meetings if opportunities for new tasks arise, inform your manager that you're open to new tasks, or talk to your project manager about any pain points or gaps with which you can help.

In my experience, being flexible and embracing these tasks has enabled me to learn new skills and look and feel like a team player. My colleagues who refused to perform tasks outside of standard technical communication duties were often passed over for promotions or let go during resource cutting. Flexibility is key to job security and to becoming a better technical communicator.

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Looking for Carrots: Ideas for Encouraging Online Collaboration in the Workplace

By KIM IVEY-BOURNE | *STC Member*

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COLLABORATION IS QUITE the buzzword these days, and arguably a business necessity in the modern world. Online collaboration offers a great deal of potential for accomplishing tasks at work, because the people in virtual teams do not need to spend a lot of time together in conference rooms. However, a key obstacle to fulfilling the dream of thriving online collaborations in the workplace is very basic—getting people to actually participate.

Technical communicators often have no traditional authority over potential collaborators, yet they may be called upon to support collaboration as participants or facilitators. Technical communicators can step into an informal leadership role in collaborative efforts by modelling collaborative behavior and initiating conversations that clarify the collaboration's goals. Leadership-minded technical communicators will likely find themselves wondering how they can encourage reluctant collaborators to participate in online collaborative work. What if we imagine this in terms of carrot vs. stick? (This idea comes from an expression where a carrot is used to entice a mule to move, but a stick is used to punish it for not moving.) Since using a stick is out of the question for technical communicators, what sorts of carrots can we use?

Carrot Tech

Technology does affect the motivations of potential collaborators, but it is ultimately social and psychological factors surrounding technology that have the most influence on collaborators' motivations. People are more likely to use technology that is familiar to them, which makes training and instruction a handy carrot if they are not already familiar with the technologies that support the collaboration. If the technologies are new but similar to other familiar technologies, emphasize similarities to build collaborators' confidence in using the new technology. Use caution when crafting training materials, and make sure that the instruction helps attendees become more self-sufficient and empowered to collaborate for themselves, rather than training them to rely on others to do their work for them. People who feel confident in their ability to use a given piece of technology are more likely to do so.

Keep in mind that collaborative efforts change over time, and technology requirements may evolve as well. As the collaborative effort matures, collaborators may need access to more data or enhanced features in the technologies they are using. For example, some collaborators may feel more ready to accept responsibility for system-configuration tasks or approving changes as they become more familiar with the technologies and their fellow collaborators. Making sure that collaborators have appropriate access and functionality for the tasks they need to complete increases the likelihood that they will feel inclined to produce some collaborative work.

Goals, scope, and participants will all change as time goes on. Team members who have established positive working relationships are more likely to feel that any rough edges aggravated by flailing with unfamiliar technology will be smoothed over by camaraderie, which can translate into an increase in participation. If the technology starts to lag behind the collaborators' requirements, raise those concerns to people who are empowered to make decisions about the technology.

What Does Management Think a Carrot Looks Like?

If management has set goals for a collaborative effort, the technical communicator should make sure that the goals are clearly expressed and that all team members are aware of them. Periodic reminders and status checks against the goals are helpful to keep everyone focused and feeling that their work is meaningful and making progress. If management has set up a collaborative knowledge-building effort and has not given clear goals for it, ask for the goals! If people are uncertain of the reasons why they are working on something and how it fits into the bigger picture, it is powerfully demotivating.

Don't despair if progress checks reveal that the collaboration is falling short of the stated goals. In this case, the purpose of measuring against goals is to help people understand where things stand, and it is not a reason for managers to break out the sticks. Advise managers to put the sticks down, because sticks will adversely affect trust, which is discussed below. Initiate conversations with team members about why the collaboration might be missing its goals, listen attentively, thank people for their time, acknowledge their ideas, and escalate concerns to management (if necessary) to get things back on track.

Individual Carrots May Vary

People can be motivated by organizational goals, but the bigger carrots are found at the personal level. People who feel a great sense of identification with their team of collaborators are more likely to find team-level goals inspiring. In online collaborations where distance is a notable factor and face-to-face interactions are limited, team cohesion can be a bit of a challenge. Regardless of their team's stated goals (or lack of them), people are inspired by the idea that their work will become more effective or more efficient as a result of their willingness to collaborate—preferably both.

Make the case to individual collaborators that collaborating is worth their time and attention. If people believe that the outcomes of a collaborative effort will benefit them, they are more invested in helping it succeed. Talk to people about how the collaboration has been a good resource for you. If it is a new collaboration, talk about its potential, and ask other collaborators how they see its potential. Have conversations with people about the challenges they face that could be assisted by the products of the collaboration, and explore ways that the collaboration can pay off for them as individuals.

Carrot Culture

People are more likely to voluntarily collaborate with people they trust: people who will forgive minor mistakes (and major ones, too, on occasion), people who will not "throw them under the bus" when troubles inevitably arise, people who will not criticize or judge them harshly, and people who are generally approachable and friendly. In virtual teams, it can be more challenging to build trust, because people have less face-to-face interaction, and there is a tendency for people to project their own fears onto people they don't know very well. Actions that result in a more trusting collaborative environment are often subtle and easy to underestimate, but the atmosphere they create pays off over time. Some studies indicate that reciprocity, the concept of "you scratch my back and I'll scratch yours," is a key component of trust, and others emphasize a non-judgmental culture in which ideas can be expressed freely without fear of losing social status.

Transparent and timely communication about how the collaboration is going builds trust, because it counters the worry that participants don't know the whole story and may be ambushed by something. Provide regular summaries and updates so that new or less devoted participants can easily find their place in the collaborative effort without having to sort through a lot of history and winding threads of discussion that may not directly relate to the present state of the collaboration.

The development of a Transactional Memory System (TMS) is one way that trust-building can pay off. In a TMS, people and their specific skills and knowledge are parts of a fluid social system that can be accessed by other members. Trust is a prerequisite for the informal connections between people in the system. People are more likely to reach out to others who possess expertise that they lack if they trust them, and this can save a lot of time and effort. People with expertise are also more likely to be helpful if they trust you and believe that you will return the favor.

Technical communicators may need to step in and out of informal leadership roles to build momentum for a new collaboration, or to reinvigorate older collaborative efforts if the work stalls. Even if a leadership role isn't validated by the latest org chart, technical communicators can model behaviors that get results. Effective leaders take note of the motivations and goals in play for their team and take steps to find and articulate harmonies between personal motivations, team motivations, and the goals of the overall organization.

Figure 1. Collaboration Carrots

Simple leadership behaviors that technical communicators can use to inspire their teams are acknowledgment of work well-done and genuine expressions of gratitude for assistance. People who feel like they *can* do work are more likely to do it. Positive feedback and acknowledgment of a job well done can boost people's confidence. Compliments are free! People who feel good about the work they are doing are more likely to keep doing good work.

If these behaviors take root in the culture of the collaboration, the benefits of a trusting collaboration will multiply. All team members can become informal leaders in this way even if they are only leaders of themselves.

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STC 2018 Election Results

STC, THE NOMINATING Committee, and the Board of Directors are pleased to announce the results of the 2018 STC election.

When voting concluded, of 2,853 eligible voters, 455 (15.95%) cast ballots. There were some abstentions in each of the categories.

Congratulations to those elected, and great appreciation is extended to all candidates for their dedication to STC and willingness to devote their time and energy to improving our Society by running for office. According to STC's Bylaws, the results become official when they are announced at the Annual Business Meeting at the STC Technical Communication Summit & Expo in Orlando, FL, on Tuesday, 22 May 2018.

President

Jane Wilson
(automatically succeeds from Vice President)

Vice President

Ben Woelk*	290
Pam Estes Brewer	159

Secretary

Kirsty Taylor*	446

Director (two spots)

Alisa Bonsignore*	299
Todd DeLuca*	270
Ramesh Aiyyangar	136
Makarand Pandit	132

Nominating Committee (two spots)

Jackie Damrau*	310
MaryKay Grueneberg*	272
Li-At Rathbun	263

**elected*

Community of the Year and Most Improved Community

EACH YEAR, the Community Achievement Awards recognize a SIG, professional, or student chapter's outstanding accomplishments in achieving the Society's goals through a wide range of programs and activities. Communities are awarded Platinum, Gold, Silver, and Bronze awards. The Community of the Year is chosen from among the Platinum Communities (previously Communities of Distinction) and announced at the STC Summit.

This year's Community of the Year is the Philadelphia Metro Chapter. The citation reads: **For a truly remarkable 2017 Community Achievement Award year filled with strong activities, including student outreach programs, unique social networking events, and your annual CONDUIT conference. STC Philadelphia Metro is a solid example of a successful STC chapter that fosters communication, education, and outreach in the technical communication profession.**

This year, a Most Improved Community was also selected. The Most Improved Community is given to the community that "stepped up their game" the most from one year to the next, based on their applications for the Community Achievement Award (CAA).

This year's Most Improved Community is the Texas Tech University Chapter. The citation reads: **For a 2017 Community Achievement Award year that showed an impressive increase in student outreach activities and quality education programs, as well as strengthened social media presence. STC's Texas Tech University Student Chapter clearly demonstrates a strong dedication to the development of future technical communicators.**

Congratulations to the Philadelphia Metro and Texas Tech University Chapters and their members!

Finding Information Resources in the Metrics Community

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BY MARK LEWIS | *STC Fellow*

Dear Content Tribe,

I'd like to take you on a journey about metrics resources and responsibility and ask you to brainstorm with me.

I founded the DITA Metrics group on LinkedIn in 2010. The goal of the group is to provide a vehicle for discussions about metrics, for sharing knowledge and experience. In addition, if I find a good resource on content metrics that is not DITA specific but applicable, I include that resource.

Are resources on metrics important? They are according to the 2017 DITA Satisfaction Survey by Scott Abel. In this survey, two of the top five "Biggest Challenges to DITA Adoption" were related to funding and ROI. Both topics require metrics.

I've always thought of LinkedIn as being far more than a "résumé" website. The amount of knowledge that is shared in LinkedIn groups and blogs has always amazed me. But as an active LinkedIn group moderator and participant, I've noticed some ongoing challenges:

- Finding information in LinkedIn groups when we need it and finding LinkedIn groups.
- Retaining the vast wealth of knowledge of LinkedIn group. members long after it appears in a group feed.

Let's dive deeper into these points by using the DITA Metrics group as an example.

Challenge 1: Finding Knowledge in LinkedIn Groups and Finding LinkedIn Groups

I've been concerned for a while that knowledge in my LinkedIn group might be difficult to find. This concern surfaced again recently when a member asked the group about "metrics for DITA topic reuse." My first thought was, *I know there are multiple posts on this subject. Oh No! Are those posts hard to find?* That was the whole purpose of DITA Metrics group, to share knowledge.

Maybe the member simply tried scrolling and looking at titles. If the member searches for "topic reuse metrics" within the DITA Metrics LinkedIn group, ten posts display in the results. Are these the best posts for "topic reuse metrics"? No, not exactly. I tried this search and did

In the content world, metrics can be used to prove a business case, communicate value, or predict costs and savings. This column explores new thoughts and ideas in the area of metrics and ROI. Please send your ideas, comments, and questions to *mlewis@ditametrics.com.*

not see one of the relevant posts that I was expecting.

At the bottom of the search results list, I could select the **Load more** command, and the next ten posts displayed at the bottom of the list. After I selected **Load more**, I still did not see the relevant post I expected.

Aargh!

Is there a solution? Before we look at possibilities, let's back up one level—awareness of a LinkedIn group's existence.

Finding LinkedIn Groups

Does "everyone" know that the DITA Metrics LinkedIn group resource exists? I wonder. It may be hidden within LinkedIn. I've posted in the DITA Awareness group to raise awareness about the metrics group. But if you are not a member of the DITA Awareness group, then those posts are probably hidden from you.

If you Google search for "DITA topic reuse metrics," does the group occur in the results? Not in the first few pages of search results. And there's no result with the title "DITA Metrics LinkedIn Group."

Keith Schengili-Roberts maintains a popular DITA resource at *DITA Writer.com*. His site mentions the group as a resource, in the prominent blog roll on the home page. Thank you, Keith. But in the DITA Awareness LinkedIn group, only one in ten members are also members of the DITA Metrics group. Is the lower membership because people don't realize the importance of content metrics, or is it because people don't know that the DITA Metrics group even exists?

Hmmm…

So, how can we make it easier to find the DITA Metrics group? Here are some things I can do:

- Post again in the DITA Awareness group about the existence of the metrics group. It's been a while. I try not to spam.
- Add keywords to the group description: "content metrics," "XML metrics," and "business case." I don't know how the LinkedIn search feature works, so I'm not sure if this will help.
- Create a Web page outside of LinkedIn that's easy to find when someone searches for metrics-related resources for DITA. To do this, I would give the page a title, such as "DITA Metrics LinkedIn Group," that stands out in search results. Even if you don't follow the link in the results, you will see the title and know that the group exists.

I know these are simple and small things, but I feel a responsibility to make this resource as findable as possible. Hopefully these will make a big difference in findability.

Should we do this for other LinkedIn groups to raise awareness?

Handling Clutter in LinkedIn Groups

Now that we have some solutions to make the DITA Metrics group findable, let's return to the content/knowledge within the group and another issue that can occur within a LinkedIn group or similar forum: clutter. When I say, "clutter," I mean non-metrics related postings.

This group is metrics specific. I've stated that as the purpose of the group and reminded members in a recent post to that effect. When someone adds a post that is about DITA, but not metrics related, I encourage them to add their post to the DITA Awareness LinkedIn group. Then I delete their post. If someone adds a non-metrics post, I delete their post. I do this to maximize the findability of the valuable knowledge posts within the metrics group. This applies whether members are simply scrolling the list of posts or are using the search feature.

Another form of clutter is obsolete posts. For example, if someone posts about a relevant webinar, and after the webinar there are no recordings or slides that can be added as a link in a comment, then I delete their post. Otherwise, I keep the post.

Some posts grow old. But does that mean they're no longer relevant? I don't know, so I'll keep them until I know for sure. I mention this because one member assumed that any posts more than seven years old must not be relevant. Please don't make this assumption. Some of these posts are about core DITA 1.1 features that are still relevant or are about methodologies developed years ago that are still relevant.

Delete the clutter. If you are the owner of a group or forum, you have a responsibility to your community to "maintain" that resource. Your community is depending on you. That's my opinion. Thoughts?

Improving Findability without Keywords

So now, we're back to searching and finding the content/knowledge within the DITA Metrics group. Recall that in the earlier search example for "topic reuse metrics," I discovered that the findability of a given topic within a group is low. As a group owner, I can't add keywords to someone else's post.

Hmmm…

Does this mean that I need to create a website that exists outside of a LinkedIn group and provides an index? This website could be a type of eBook with a table of contents, index, and search to maximize our ability to find a post within the DITA Metrics LinkedIn group. Several thought leaders that I asked agreed that this may be the solution. Thoughts?

Challenge 2: Retaining Knowledge in LinkedIn Groups

Some LinkedIn posts are self-contained and include all the pertinent knowledge directly in the post. However, most of the posts are "teaser" posts that describe valuable content and then provide a link to the source that is stored external to LinkedIn. The external content may be in the form of a PDF, webinar recording, blog, or other Web page. The problem is that over time, some of the external content has been moved or removed, the links from the group posts are

broken, and the knowledge may be effectively lost.

Aargh!

To ensure this valuable information isn't gone forever, I will contact the owners of the lost knowledge and request an updated link or find the moved content myself. I will also ask for permission to host a copy of the content on my website and add that content to the index.

Conclusion

You might wonder, why is Mark writing about this topic in a Metrics column? Because I HATE LOSING KNOWLEDGE. Members of our Content Tribe have worked very hard to create valuable knowledge. And other members benefit from this knowledge. We are a community.

Compared to other content topics, there are relatively few resources on metrics. Yes, there are metrics in several books, such as:

- *Enterprise Content Strategy: A Project Guide* by Kevin Nichols
- *Content Audits and Inventories: A Handbook* by Paula Land
- *DITA Metrics 101: The Business Case for XML and Intelligent Content* by Mark Lewis

But there are few digital articles on metrics. I created the DITA Metrics LinkedIn group to provide a vehicle for sharing metrics knowledge. To ensure the findability and preservation of metrics knowledge, I will commit to creating and maintaining a metrics website.

If you are the owner of metrics knowledge, I ask your permission to host a copy of that knowledge on the metrics website. If that is not possible, then I ask that you notify me if you move your content so that I can update my index.

By the time this article is published, I will have created, at a minimum, a Web page containing a list of links (repaired) to all the metrics knowledge in the DITA Metrics LinkedIn group. See *DITAMetrics.com*.

But I am open to suggestions. Is there a better way to help members find valuable knowledge and store knowledge? Please send me your ideas.

We are a community. We need to share knowledge to thrive. So, as I often end my blogs and articles…

Share. Learn. Grow.

Sincerely, Mark Lewis

P.S.
Thanks to the following tribe members for brainstorming with me on this topic: Joe Gollner, Val Swisher, Sarah O'Keefe, and Cheryl Landes.

P.S.S.
"Measuring the Value of Content" is the theme of the September issue of *Intercom*. I am the guest editor for that issue, and I have begun designing the list of topics that I think should be covered. I want to make sure we cover the topics that you are interested in, so please email me your requests at *mlewis@diametrics.com*.

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Context, Culture, and Usability

BY KIRK ST.AMANT | *STC Fellow*

USABILITY IS ABOUT CONTEXT. If you know where someone performs a process, you can develop materials for that setting. The idea is conforming content to context makes that content easy to use. Today's global economy complicates this situation by increasing the contexts in which individuals use products. Technical communicators can address this challenge by identifying central factors affecting usability in different settings.

Objectives, Contexts, and Use

Individuals use products to achieve specific objectives (e.g., using a hammer to pound a nail). This *objective of use* means we assess usability based on how well a product lets us achieve our objective for using it. However, the location where processes take place can vary from person to person. These differences can affect the perceived usability of a product.

Consider the process of changing a tire. The objective is to replace one tire (a flat) with another (a spare). The size of the space where you perform this process affects what you can do (e.g., how you can apply leverage to use a tire iron to loosen nuts or a lever to work a jack). Likewise, the amount of light in that setting affects what you can see and do in that location. Technical instructions for changing a tire need to be designed to address such factors for them to be usable in that setting. This relationship between content (the information individuals can use) and contexts (where they use that content) determines what constitutes the usable design—or usability of a product.

Variables, Context, and Use

Designing for such *context of use* involves identifying the factors affecting how we use materials in an environment. These *variables of use* can differ from setting to setting, but they are often connected to our past experiences and related expectations.

The idea works as follows: the more you perform a task in a setting, the more you view that setting as the context in which you will attempt to achieve a particular objective. If, for example, every time I've had to change a tire it was in an open, well-lit, and quiet space, I would consider that setting the standard context for performing that process. The variables of use are those factors I expect to be in that setting based on my prior experiences changing a tire, and I will consider materials designed to meet these contextual expectations as more usable. Past experiences of use thus dictate future expectations of usability.

Location, Expectation, and Use

If you own a car, where do you expect to drive it? What conditions are present in those contexts, and how might they limit what you can do when you need to change a tire? These factors can vary by nation and can affect the experience-based expectations individuals have for a context of use. Similarly, the tools that come "standard" with a car are based on experiences, and they affect expectations of what one can and cannot do based on the tools one expects to use. So do societal factors—such as the laws dictating where and when one can change a tire—and cultural norms dictating who may perform this action, when, and how. All these aspects can differ from nation to nation, and each can affect context-based expectations of usability.

The problem is certain variables might be easier to identify than others. For example, information on the kinds and conditions of roads in a nation can be easy to locate via data about a nation's climate, geography, and infrastructure (see, for example

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nation-specific entries found online at *https://www.cia.gov/library/publications/the-world-factbook/*). Knowing who can and cannot change a tire according to societal convention, however, requires a broader understanding of culture and its complexities. Technical communicators need to consider all of these factors when researching the contexts of use in different nations. A modified version of schema theory can help with this process.

Schemas, Characteristics, and Expectations

Schemas encompass the mental models we have for what something should look like. When, for example, I say the word "garage," a particular visual pops to mind. That visual is the ideal version of what I think a garage should look like. This ideal is comprised of different elements—or characteristics—I expect to be present for me to consider a location to be a garage. These factors include:

- *Who* I expect to be there to perform certain activities (e.g., mechanics who change a tire).

This column examines different aspects of technical communication in global contexts. Email the editor at *stamantk@ecu.edu.*

- *What* items I expect to be present in that setting (e.g., a tire iron and jack for changing a tire).
- *How* I expect to get items into that context (e.g., how I drop my car off for servicing).
- *How* I expect to get items out of that context (e.g., how I leave with my car after servicing).

These factors shape my expectations of what I can and cannot do in a given setting.

Experience is key to these associations. The more I encounter certain factors or characteristics in a context, the more I expect them to be present. Similarly, the more I see certain activities done in a certain way in that setting, the more I expect that activity to take place—in that way—in that setting. So, if I know where the members of a culture expect to undertake an objective (e.g., change a tire), I know what characteristics to look for to determine what can and cannot be done, by whom, with what, and how in that setting. Using these characteristics as a guide, I can do research to map—or identify—the variables the members of a culture associate with usability in that context.

Methods, Maps, and Models

Understanding the usability expectations of another culture requires technical communicators to collect data directly from the members of that culture. Effective methods for such data collection include interviews of individuals from a culture and focus groups comprised of members of that culture. In both cases, technical communicators need to ask the members of a culture the following questions:

- **Objective:** What are you trying to do/achieve?
- **Setting:** Where will you be when you perform this process?
- **Objects:** What items will you use to perform this activity? Which of these items will be in that setting?
- **Individuals:** Who is usually in this setting, and does that person help with the activity? (If so, how or what do they do?)
- **Access:** How did you enter or get to this setting? If you need help or have questions while performing this activity, how do you get such help or answers?
- **Exits:** When performing this process, do you record information to share it with others outside of that setting? If so, with whom and how do you share this information? How do you move from one place to another when you are done with an activity?

Technical communicators can use the answers to these questions to determine:

- *Where* the members of a culture perform a given activity connected to a particular objective (context).
- *Who* is expected to be in that context, and *what* activities they are expected to perform.
- *What* items are individuals in that context expected to use.
- *How* one gets needed materials and information into and out of that context.

Technical communicators can use the resulting answers to create a model (i.e., an image) of what a particular context of use looks like to the members of a given culture. They can then use this model as a guide for developing usable materials for this setting.

Once an initial context model or image is created, technical communicators should again use interviews or focus groups to have members of the related culture review this model and discuss how a particular task is performed in this setting. Technical communicators could then modify the model based on audience feedback until it addressed the most common expectations across the widest range of users (i.e., the general cultural ideal or model of that context). This revised image or model could then serve as a reference point technical communicators could use when creating materials for certain international settings.

Addressing these factors means collecting data from the members of the actual audience or culture as directly as possible. Such interactions could be done in person (or by a proxy working in the nation being studied) or by synchronous online media such as WebEx, Skype, or Google Hangouts. In selecting a technology (or technologies) for such interactions, the technical communicator should first review the online connectivity available in different nations (e.g., bandwidth, software used, etc.) and identify media that allow access to the widest range of individuals for a prospective product.

Conclusion

As global markets for technical products grow, so does the need to address the usability expectations of different cultures. The concept of schemas can help technical communicators map cultural contexts in a way that provides insights on usability expectations in different parts of the world. Through such approaches, technical communicators can better understand and address the nuances of usability in today's global marketplace.

FURTHER READING

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The Elephant in the Room

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BY VANESSA GENERAUX | *Guest Columnist*

This fictional case depicts the ethical issues involved with creating messages for an audience with cultural sensitivities very different from the writer's native culture. The case ends with some ethical perspectives that may be useful; certainly other ethical perspectives apply to the case as well.

As is the tradition with this column, we welcome and encourage your responses. Let us know your answers to the questions we've posed, your thoughts on the ethical situations that technical communicators face, or send us your own ethics cases or column ideas. Please send your responses to russell.willerton@gmail.com. *Responses may appear in an upcoming issue of* Intercom *as space permits.*

JIM BONNER RECENTLY started working for Mark-It Company as a technical communicator. He specializes in video production and writing scripts for commercial advertising. Jim works with other technical colleagues, such as videographers and writers, to produce scripts for European products being launched in the United States. Although Mark-It Company is based in the United States, they work with many large companies to develop product marketing commercials all around the globe. Jim has been given his first opportunity to work in India with translators to help launch a new product for a foot cream company. Jim gladly accepts the job offer and flies over to India with the team to start work on the new project.

Currently, Jim and his team manager Korbin Joyner are working in New Delhi, India, and getting ready to launch a commercial for a new beauty cream. Jim has worked with Korbin several times on various product campaigns, and they have become friends outside of work. They meet at the television network studio to go over details of the commercial availability and other preliminary paperwork of the operation. After the meeting, Jim and Korbin brainstorm a few ideas to meet the needs of the beauty cream company and how they will be able to translate the main idea of the commercial across the language barrier. Korbin already has video clips from the U.S. version to use and just needs to translate the script for airing the following week. If he is successful running the project, he could be promoted to senior executive at Mark-It.

Korbin and Jim speak only a few phrases in Hindi (India's most widely spoken language), but neither is fluent in the language into which the script will be translated. They rely heavily on the translator working with the team, Rajiv Kemper. Rajiv, born and raised in a nearby district, has a good understanding of English from studying abroad in college. However, translating can be difficult when addressing a new audience. It is a challenge to render the meaning for the public in the way that the foot cream company would like. While reviewing the script to make the best translation, Rajiv frequently consults Jim about any nuances that may hinder or improve understanding. The script is relatively short, and he finalizes minimal changes for the voice actor. Once the script is in confirmed, they can then start the editing process with the rest of the team.

The team works diligently all week to get the new voiceover matched to the video. Jim keeps track of the timing, and checks with Rajiv about the translation

This column features ethics scenarios and issues that may affect technical communicators in the many aspects of their jobs. If you have a possible solution to a scenario, your own case, or feedback in general, please contact column editor Russell Willerton at *russell.willerton@gmail.com.*

one more time. Upon viewing the commercial for the first time, Rajiv's jaw drops. The meeting that Rajiv had attended mainly reviewed the specifics of time, legal documents, and pricing for air time on the network, and did not go over the details of the video clips. During the week, Rajiv and Jim had reviewed translation on paper, and Rajiv hadn't seen the footage that would be used on screen. Trying to keep his panic under wraps, he asked Jim, "Could I speak with you regarding the video?" They stepped outside the video editing room so that Rajiv could explain his unrest.

Rajiv did his best to keep his composure while he illustrated to Jim the potential issues of the video. Rajiv recaps the video to Jim to make sure he is getting the meaning correct. The video showed a woman putting cream on her face and hands, then putting on shoes and going out for the evening. A man enters the scene outside her home and greets the woman. He is captivated by her and uses his left hand to brush a hair away from her face, tucking it behind her ear in a flirtatious way. The video then cuts to a picture of the product and the statement about radiating beauty that is "so soft you can't wait to touch it." The man reaches for the woman's hands; the video shows they are not wearing wedding rings, nor is the woman wearing necklaces or bracelets common among married women. He then gives her a short kiss as the music fades out.

Jim says, "This is what we have been working on all week. Is there a problem?" Rajiv explains that in Indian culture, the left hand is frequently viewed as unclean and inauspicious. It is also considered offensive for individuals to touch one another if they are not wed or in the family circle. Finally, public displays of affection are strongly discouraged. After listening to Rajiv's explanation of the cultural differences, Jim immediately went to the station to explain everything to Korbin. Jim has not had to face a cultural difference like this before and has only assisted in adapting commercials for American audiences in the past.

Korbin, after listening to Jim describe the ways the video would be considered offensive, immediately cut Jim off from his protests. Korbin had been given the task of recreating the commercial and broadcasting it in India, which is what he intended to do. Korbin understood that there were different cultural mannerisms that could be a hindrance to the project, but felt his duty was to the company and to producing results. Jim tried to explain the importance of the matter several times, but Korbin brushed him off stating, "We were sent here to translate and get the commercial to air.... Whatever happens next is up to the company."

Questions

Jim is at a loss, and even worse is that he knows Korbin, his manager and friend, could get in trouble if they do not change the commercial before broadcasting it. What should Jim do to get through to Korbin? What could happen to a company that plays an offensive commercial? Should Jim contact the main branch and go above Korbin's authority? How can Jim's technical communication skills help him and his team in this situation?

Ethical Theories that Can Apply to this Scenario:

Utilitarian: With the new information brought to light about the cultural differences and issues with the video, Korbin knows that there will be major repercussions. Korbin neglected to do research on the culture and assumed the crossover from American culture to Indian culture would be easy. Now that time is short, he knows that if the video airs on the Indian television station, it could mean offending a broad audience. But if the video doesn't air on time, Korbin will have cost the company a lot of time and money.

Dialogic approach: In this scenario, Korbin is in charge of the project and thinks that everything has been going to plan. However, approached with this new information, he denies Jim's information on the audience and their perspectives. Instead of reasoning, he cuts Jim off, not allowing Jim to give advice or options on how to tackle the issue.

Kant's categorical imperative: Kant says no person should use another as a means to an end. Without expecting anything in return, we should treat others as we want to be treated.

Four Moralities (from Johannesen, Valde, and Whedbee): Korbin does not invoke the *habit of search* in this scenario; otherwise, he would have done a bit more checking about the cultural disconnect that the video could have posed. He also violates preferences of *public versus private* issues. Korbin faces hard facts that could make the commercial flop. However, he also wants to air the commercial to finish the project. Finally, he also denies the arguments Jim is trying to address by not showing the *habit of respect for dissent*, and will not allow for any compromise. These issues will affect his interpersonal relationship with Jim, as well as his position at Mark-It Company.

VANESSA GENERAUX (nessgeneraux @u.boisestate.edu) *resides in Boise, Idaho, and recently completed her MA in technical communication at Boise State University. She's passionate about technical communication, open educational resources, and cross-cultural communication. In her spare time, she enjoys a good science-fiction book, video games, and hangs out with her cat, Mavis.*

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Side Hustles and Restructuring

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BY CINDY CURRIE | *STC Fellow* and
KIT BROWN-HOEKSTRA | *STC Fellow*

We are moving to Agile, and I need to restructure my team. What are some best practices/gotchas?

Many teams are moving to Agile, so it's time to really understand what that means to both your current job and, possibly, future jobs. You'll need to educate yourself on Agile or take full advantage of any education available in your company, particularly any sessions that your dev team will be attending. Two key tenets of Agile are 1) frequent releases to deliver value often, and 2) less documentation. You'll need to work with your development team to assess how the move to Agile can and will impact the deliverables your team produces. What Agile tools is the dev team planning to use? How many scrum teams will your dev team have? What is the focus of each team? What is the duration of their sprints? How much work do they accomplish in a sprint? Are they planning to include writers in their scrum teams? (The answer to this last question should be a resounding "yes!") And, what are the opportunities for one or more members of your team to become scrum masters? For example, if you prepare online help for a product or offering and have been delivering quarterly, this could change to monthly or every two weeks. It is essential to take initiative and get engaged with dev so that you understand the new requirements for your team. Only then will you be able to even think about how to restructure your team to meet them. Remember that a development team can move to Agile, but that does not mean that there won't be many aspects of waterfall still in play in the company. So, you're very likely looking at a hybrid environment for a while—W-Agile! This brings its own set of challenges. More on this in another issue.

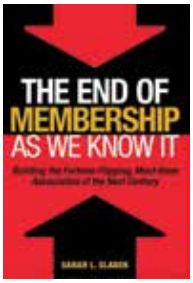
I have an opportunity to do some freelance work on the side, but I'm not sure if I should tell my boss. How should I approach this situation?

Most companies have a Conflict of Interest policy to which employees must adhere. Your first step is to locate that policy for your company and understand it. If it's a clear conflict of interest, do not pursue the opportunity or you 1) risk losing your job if your conflict is discovered, and 2) risk losing your professional reputation if you pursue an opportunity that you know violates the policy. If it seems to you that no conflict of interest exists, then schedule a meeting with your boss to discuss the opportunity. Explain that you have reviewed the company's conflict of interest policy and that you feel no conflict exists. Allow your boss time to consider both your opportunity and the company's policy. Your boss might express concern about your focus on your job if you take the side opportunity, so be prepared to explain how you intend to balance the work, when and where you'll do the other work, and if there is going to be any risk to meeting any and all commitments. This includes any time away from the office you may need to meet with others regarding the side work. Assure your boss that you will not be using any company resources to do the work as well. You must keep your main job and any side work completely separate.

Ask a Tech Comm Manager is an advice column geared toward answering all those questions you have, but might be uncomfortable asking. We glean the questions from social media, forums, and most importantly, from you, dear reader. If we don't know an answer, we will interview experts and get information for you. Send us your questions to *kitbh.stc@gmail.com* or tweet them to *@kitcomgenesis* or the hashtag *#askTCmgr*.

A Review of *The End of Membership As We Know It*

BY NOEL ATZMILLER | *STC Senior Member*



The End of Membership As We Know It
By Sarah L. Sladek
ASAE: The Center for Association Leadership (2011), Washington, DC

THIS IS A BOOK about change—societal and organizational—and what associations must do to deal with this.

Author Sarah Sladek is an experienced marketing and media professional who started researching demographic shifts in 2002. In this book, she uses her extensive experience and research to explain the drastic changes that are affecting associations. Her explanations are blunt and startling.

According to Sladek, until the year 2000, most associations benefited tremendously from the participation and activity of "Baby Boomers"—people who were born between 1946 and 1964. Boomers, the largest generation in American history, generated numerous associations with thriving memberships. Boomers were driven by the opportunity to serve and to "fix" whatever ailed associations. These individuals paid their association dues, says Sladek, "Because it was the right thing to do." Boomers tolerated some internal association conflict, accepted (to a certain extent) bureaucracy, and worked within rigid organizational structures.

Things are changing, however.

Between 2001 and 2030, some 78 million Boomers will retire. This shift poses a great threat to associations; most are entirely governed and supported by the Baby Boomer generation. Very few associations have or are developing strategies to cushion themselves from this massive exodus of members, committee chairs, and dedicated volunteers.

Additional social changes within the last 20 years have also occurred. Concepts such as the importance of work-life balance and more emphasis on individuality rather than conformity have engendered people with dramatically different needs, values, wants, and expectations.

Technology has also challenged people to adapt and integrate new technological advancements into their lives. Access to networks and information is possible without the assistance of associations. Entire generations that have never known life without technology are entering—or are now in—the workplace.

This dual impact of societal changes and technology have fostered generations of people who question the value of membership in associations. The author flatly states, "Younger people seek and demand a return for membership, including tangible member services, high levels of accountability, identifiable career advantages, a sense of professional community, and opportunities to serve within associations."

These younger individuals, called Generation X and Generation Y (Gen X, Gen Y), have completely different values, interests, needs, and wants than the Boomers. Gen X and Gen Y have different worldviews and priorities as a result of their social experiences. They will not respond to recruiting efforts of the past. An entirely new approach is required. Everything about membership in associations must change.

Sladek flatly declares, "Now, more than ever, associations need to be able to prove beyond a doubt that membership provides a return on investment to their members—especially its youngest members and prospects."

A Game Plan

The author then outlines an approach that associations should follow. This approach involves an understanding of niche, culture, and value.

Niche

According to the author, the associations of the past focused on quantity—getting as many members as possible without alienating anyone. The result can be a generalized, watered-down explanation of the association's value to members. In a world with more access to information and competition than ever before, an association must be the "go-to resource" for one audience. More specifically, an association must set itself apart as the "expert," providing ample resources in its area of expertise to members. People looking for this expertise will find it and quickly ascertain the value of joining the association. In short, an association must seek to be meaningful to *someone*, not everyone.

Culture

Every association has a culture. Culture is the environment and experiences the association creates for its members. It's the values, beliefs, underlying assumptions, experiences, and habits that create the association's behavior and ways of working. The association's website content, the interaction

of board members in meetings, the attendance during association meetings, and the willingness of volunteers to participate and speak loudly about an association's culture.

And why does this matter? The younger generations are driven by personal happiness. They refuse to engage in anything negative, challenging, or draining of their time and energy. They will also refuse to engage in a culture that is not open to them.

Value

Here, the author focused on money—more specifically, the value that members receive for paying their association dues. Associations must now prove their worth. Associations must answer Gen X and Gen Y individuals when they ask, "What's in it for me?" The author suggests that associations must respond to the younger generations' desire to become involved with a cause. These people want to be inspired to make a difference.

At this point in the book, Sladek stressed that an association must *never* cite networking as a member benefit. Networking is an activity that may result from joining an association, but it is not exclusive to it. Thanks to technology, Gen X and Gen Y can easily find people with whom they want to network, and they do not need an association to do this.

The author states that associations must ask the members to describe what they value. Through the use of surveys, interviews, or focus groups, an association must determine what makes a difference in the lives of its members. In other words, the *members* (or potential members) tell the association what it must do to provide value.

Associations must produce and transmit a clear message of the return on investment (ROI) that paying members receive. An "ROI-driven association" is completely focused on delivering value and attending to the needs of its members. Members receive as a return on their dues access to valuable information, opportunities, and resources. Membership ROI also means delivering a variety of meaningful member benefits.

Providing Opportunities with Benefits

According to Sladek, associations must address the wants and needs of the under-45 crowd. Consequently, associations must focus on three primary objectives:

- The opportunity to lead.
- The opportunity to learn.
- The opportunity to make a difference.

Younger generations will invest in a membership if—and only if—membership benefits them personally and professionally, and if it benefits their community or industry.

The author then provides several suggestions and examples of how to fulfill these three objectives.

Leadership

Gen X and Gen Y will lead if their leadership experience is enjoyable, rewarding, and has real outcomes. Recognition for their efforts is also crucial. Associations must provide leadership training, mentoring, short-term leadership opportunities, and recognition.

Learning

Young professionals actively seek the opportunity to learn new skills. They want to expand and hone their skill-sets in case they lose their jobs. In response, associations must expand their professional development offerings, but they must not limit them to in-person events. Associations must use technology and creativity: webinars that are recorded for download at a later time, video or audio recordings of association programs, podcasts that provide helpful information or tips, mentoring programs, and round-table small-group discussions.

Making a Difference

The ways Gen X and Gen Y want to work, and for whom they choose to work, carry over into their decision-making process with memberships. These generations want to know their participation in an association can literally make a difference in their personal and professional lives—and in the lives of others. Socially conscious member benefits might include organized fundraisers, a portion of dues being directed to community or industry needs, or service projects that enable members to engage, volunteer, and make a difference.

This book provides much more detail on these topics. It also provides more explanations of why associations must change to survive. The author includes specific steps an association should take to make this change.

Impact on STC

As I read this book, I naturally thought about our STC chapter. Perhaps we should follow these suggestions and approaches to ensure the success of our organization. At the very least, we need to consider how we are going to deal with the decline in membership.

I would be interested in responses to this book review. I would also appreciate ideas and feedback on how our chapter might meet the needs of our younger members.

This book is available on *Amazon.com*.

NOEL ATZMILLER (noel2@airmail.net) *is the Manager of Technical Publications at Baker Hughes, a GE company. Noel began his 34-year career in technical communications in the petrochemical engineering and construction industry. During his career, he has produced many documents for other industries, including natural gas transmission, IT, and oil/gas. Noel has authored several articles that have been published in corporate and oil/gas trade publications. In 2010, his competition entry was awarded Best of Show at the STC Summit in Dallas, Texas. His award-winning document chronicled the first 75 years of Baker Atlas, a previous division of Baker Hughes. At Baker Hughes, Noel helps authors by providing many services, including document editing, leading training for writing conference abstracts and papers, and providing user support for the corporate document management system.*

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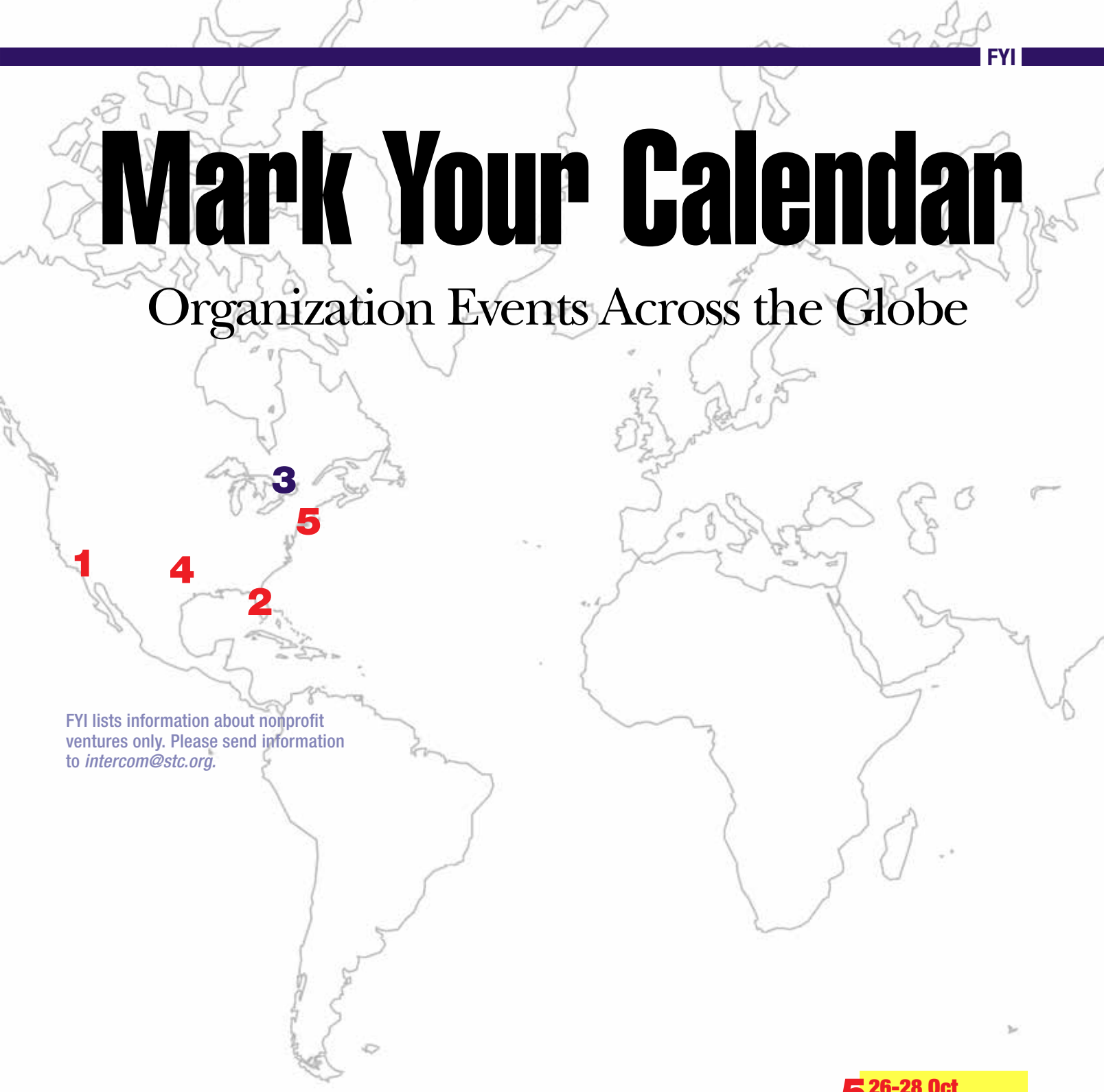

FYI lists information about nonprofit ventures only. Please send information to *intercom@stc.org.*

1 15-18 May
Bid & Proposal Con 2018, the Association of Bid, Proposal, Business Development, Capture, and Graphics Professionals' (APMP) annual conference, will take place 15-18 May 2018 at the Sheraton San Diego Hotel & Marina in San Diego, CA.
APMP
http://www.apmp.org/
conference@apmp.org

2 20-23 May
The **65th Annual Technical Communication Summit and Expo** will take place 20-23 May 2018 at the Hyatt Regency in Orlando, FL, with a theme of "Communicate the Future."
STC Summit
https://summit.stc.org/
summit@stc.org

3 23-25 July
ProComm 2018, the IEEE International Communication Society's annual conference, will take place 26-27 July 2018 at the Bahen Centre for Information Technology at the University of Toronto, ON, Canada.
InterChange
http://procomm2018.utoronto.ca/
ieeeprocomm@gmail.com

4 7-9 Oct
The 2018 Public Relations Society of America (PRSA) International Conference will take place 7-9 October 2018 at the JW Marriott Hotel, Austin, TX.
PRSA
http://apps.prsa.org/Conferences/

5 26-28 Oct
InterChange, the STC New England Chapter's annual technical communication conference, will take place 26-27 October 2018 at the UMass Lowell Inn and Conference Center in Lowell, MA.
InterChange
http://stcnewengland.org/interchange
admin@stcnewengland.org

* STC-related event

When Uncertainty Raises Its Ugly Head, Stretch

BY TONY BOVE | *STC Member*

MY NAME IS Tony Bove. After more than 20 years as an independent contractor, I am now employed as a technical writer for Stanley Black & Decker. July 28th was my three-year anniversary with the company, and I can honestly say that this position is the highlight of my entire career. Don't get me wrong—I enjoyed being self-employed, and I had some great short-term gigs—but permanent positions in this field are rare here in Ottawa. It seemed that only the very large companies had the resources for a technical publications department, and they proved very difficult to join until now.

It's been an interesting experience so far here at Stanley. I was hired by the Healthcare Business Unit in Canada dedicated to the InnerSpace product line, which manufactures hospital carts and cabinets. I spent the first six months fine-tuning my Adobe InDesign skills, becoming familiar with the publishing standards, improving them wherever I could, and drowning in product specifications. My sandbox was TechPubs: datasheets, user guides, installation instructions, specifications guides—anything a customer or user might need after the sale had been made (so, no marketing material). This is actually the kind of stuff I LOVE to work on (I know; I'm weird).

As soon as I hit my stride, it was announced that InnerSpace was to be transferred from Healthcare to the Global Tools and Storage (GTS) business unit. UGH! Uncertainty. I didn't know if the new group already had technical writers, if they even wanted a technical writer, or if my position would be eliminated or moved to the United States, where GTS was headquartered. So, I offered my services to two other brands in GTS (Vidmar and Lista), and they accepted my offer enthusiastically. Another six months later, it was confirmed that my position would remain intact, and my job would be transferred from Healthcare to GTS. Relocation was never discussed; I would be the sole Canadian employee of GTS, and I would be the sole technical writer officially responsible for supporting all three brands. Phew!

I no longer reported to the manager who hired me, who was located in Ottawa; my new supervisor was located in New Britain, CT. So, for the first time in my career, I became a *remote resource*. Fast forward another six months, and the office where I was situated was running short on desk space, so they gave me a laptop and told me to work from home. I celebrated by getting a Rottweiler puppy since I would be home to housebreak and train her (her name is Belle, by the way).

At some point, I heard unsubstantiated gossip that some brands in GTS may be sold off. UGH! Here we go again. Uncertainty. I made my services available to a couple of brands in the hand tools business group, and they accepted my offer. I added the Proto brand to my ever-expanding portfolio, and I did a project or two for DeWalt, but they didn't really take off. The gossip of a pending sale ended up being just that—gossip—but I was learning more about the business, building my network, and improving my skills every step of the way.

Then, just a few months ago, there was yet another reorganization, and my boss was transitioned to a new role. UGH! Here we go with more uncertainty. I was eventually informed that my position was to be transferred to the Global Technical Graphics and Documentation group. I never even knew that such a group existed. This was a group with 20 employees, plus a dedicated manager. Seriously? In my mind, I went from being a lone wolf to just another cog in a machine. My mind raced. Do they even need another technical writer? Will I be the only remote resource, and will that put me at risk? What if the new boss doesn't like the work I've been doing? Will I have to adapt all my templates, processes, and standards to suit the new group?

I'm happy to say that my concerns were completely without merit. My stakeholders are happy with my work, so there will be no sweeping changes, just a few minor administrative changes.

What I have learned from my time here at Stanley Black & Decker is this—when uncertainty raises its ugly head, stretch. InnerSpace is in flux? Ok, I'll offer my services to the other two cabinet makers in GTS. Storage is being reorganized? Ok, maybe there are hand tool products that could use my help. I'm being moved from GTS to GTDG? Send the new boss some samples of my past work, and invite coaching. Actively chase opportunities for growth. It makes me feel like a better informed, more qualified and capable employee, and it makes me feel (a little) more secure. There will probably be more UGH moments along the way, but I'll just keep stretching. It's worked for me so far.

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